

DreamHouse ‘Ewa Beach

A Community Charter School Initiative

‘Ewa Beach, O‘ahu, Hawai‘i

Spring 2016

Table of Contents

- I. School Overview 1
 - A. Executive Summary 1
 - B. Enrollment Summary 3
- II. Academic Plan 5
 - A. Academic Plan Overview, Academic Philosophy, and Student Population 5
 - B. Curriculum and Instructional Design 7
 - C. Special Populations and At-Risk Students 22
 - D. School Culture 33
 - E. Professional Culture and Staffing 39
 - F. School Calendar and Schedule 51
 - G. Supplemental Programs 53
 - H. Third-Party Service Providers 53
 - I. Conversion Charter School Additional Academic Information 53
- III. Organizational Plan 54
 - A. Governance 54
 - B. Performance Management 64
 - C. Ongoing Operations 73
 - D. Student Recruitment, Admission, and Enrollment 75
 - E. Parent Involvement and Community Outreach 77
 - F. Nonprofit Involvement 80
 - G. Geographic Location and Facilities 81
 - H. Start-Up Period 85
 - I. Conversion Charter School Additional Organizational Information 86
- IV. Financial Plan 87
 - A. Financial Oversight and Management 87
 - B. Operating Budget 90
- V. Applicant Capacity 94
 - A. Academic Plan Capacity 94
 - B. Organizational Plan Capacity 97
 - C. Financial Management Capacity 98

I. School Overview

A. Executive Summary

1. Mission. A mission describes the fundamental purpose of the school. The proposed school's mission statement should:
 - a. Describe the core school design components, what the proposed school will accomplish in concrete terms, and what methods it will use;
 - b. Be attainable and consistent with high academic standards;
 - c. Reflect the key values that teachers, administrators, and students know and support;
 - d. Be concise and clearly describe the proposed school's purpose for the entire school community, external stakeholders, and individuals who may not be familiar with the proposed school; and
 - e. Be able to operationalize and guide the work and school culture.

Our Mission is to empower children to be affirmed in their identities, grounded in and committed to the values of our community, and equipped with skills to be leaders. We believe in children driving change, and doing so in a way that they know who they are, what they stand for, and how they will have a positive impact on our community.

2. Vision. The vision statement describes the proposed school's highest priorities and long-term goals, identifying what will be accomplished when the school is successful in executing its mission over the long term. The vision statement should explain what success looks like in terms of students' life outcomes and the impact on the community and society. A vision statement is a broad, powerful goal whose scope is bigger than daily activities and should indicate the school's valued measures of success.

Affirmed in identity, empowered in leadership, our graduates will be the future leaders of our island community.

3. Geographic Location. Briefly describe the geographic location and, if known, the address of the facility the proposed school plans to use.

‘Ewa Beach. Specifically, south of Papiapi Road, south of Hanakahi Street, along North Road, ‘Ewa Beach Road, and Pohakupuna Road.

4. Anticipated Student Population. Briefly describe the anticipated student population, including, the geographic area(s) that the proposed school plans to serve, students' anticipated educational needs, and the non-academic challenges the proposed school is likely to encounter.

The anticipated student population will generally correlate the current demographics of the rising 6th grade class across seven feeder elementary schools in the Campbell Complex. The follow data was gathered from Hawai'i Department of Education (HIDOE) public databases, HIDOE School and System Improvement Reports, and the 2013 U.S. Census.

- Approximately 40% Filipino, 20% Native Hawaiian, 15% White, 7% Samoan, 5% Japanese, 13% additional ethnicities (Hispanic, Black, Chinese, Micronesian);

- Approximately 8% of children qualify for Special Education programming and 5% have been identified with Limited English Proficiency (Ewa Makai and Ilima Intermediate average);
- 41.3% of residents speak a language other than English at home;
- Nearly half of the 6,000 students across the seven feeder elementary schools attended pre-kindergarten;
- ‘Ewa Beach Quick Statistics: Median Income - \$70,000; Per Capita Income - \$20,557; 16.4% below poverty line (HI: 11.2%);
- ‘Ewa Beach community educational attainment: college graduate (21.6%), some college (38.9%), high school (30.5%), less than high school (8.8%).

5. Community Engagement. Briefly describe how the applicant has assessed demand and/or solicited support for the proposed school. Include a description of any significant relationships or partnerships established to generate community engagement in and support for the proposed school.

Grounded in personal teaching and administrative experience within Campbell High School, Ilima Intermediate, and Ewa Makai, we see that demand for additional educational options in ‘Ewa Beach has grown over time. Spurred by housing developments, overcrowding, a strain on resources, and a chorus of parent voices, our applicant team began a series of “education talk stories” in the spring of 2014, aimed at bringing student, parent, educator, and community leader voices into the open.

Following dozens of intimate group and one-on-one sessions, neighborhood board presentations, classroom visits and teacher talk stories, volunteer events, meetings with elected representatives, and conversations with Hawai‘i DOE representatives, it became clear that a community-driven, independent educational program was a viable option for the children and families of ‘Ewa Beach.

Significant relationships that have helped energize this initiative include, but are not limited to: Ewa Makai teachers, administrators, and students; Ilima Intermediate teachers, administrators, and students; Campbell High School teachers, administrators, and students; parents; community leaders; ‘Ewa Beach Neighborhood Board Members; elected officials; state officials; local developers; Boys and Girls Club; the University of Hawai‘i at West O‘ahu.

6. Contribution to Public Education System. Describe any anticipated contribution the proposed school would make to Hawaii’s public education system as a whole, including, if applicable, the Priority Needs identified in Section I.C of the RFP. If the proposed school would address either or both Priority Needs, provide an analysis, with relevant data, about that Priority Need and how the school would help address it. In addition to the Priority Needs, the examples of contributions to the public education system could include things like serving student demographic groups that the existing system has had challenges serving, meeting a particular curricular or instructional need or challenge in a way that has system-wide benefits, and forming partnerships or feeder-school relationships with existing public schools. Where the proposed school would model innovation in ways valuable to the system as a whole, describe any specific plans to disseminate the knowledge gained at the school to other public schools.

Of the two Priority Need areas identified by the Commission, our proposed school addresses the first need of providing additional school capacity to an area that has exceeded full enrollment capacity, especially at the secondary levels. STRIVE HI scores improved for the Campbell Complex by an average 18% from 2013-14 to 2014-15, and DreamHouse aims to contribute to this improvement narrative. Contribution details are as follows:

Adding capacity: The Campbell-Kapolei complex is the second largest in the state with James Campbell High School being the largest high school in the state with over 3,000 students (3,024 in 15-16 SY). The proposed school would eventually serve 700 students, grades 6-12.

Adding an option: Depending on which side of Fort Weaver Road a family lives, they have one middle school option: Ilima Intermediate (Diamond Head) or Ewa Makai (‘Ewa). The proposed school would serve families from either side, creating choice.

Local Control: the Hawai‘i Board of Education governs each school within the Campbell Complex. The proposed school would have a community board designed to make decisions close to this school and it’s students.

Pedagogy: our model does not track students into “gifted and talented” or remedial programs and our Response to Intervention (RTI) model is applied to all students, regardless of identified need; we believe an integrated model with highly differentiated classroom supports and heterogeneous groupings will inspire learning and growth across sub-groups and ability levels. This is particularly important given the achievement gaps between non-high needs and various sub-groups. We offer this integrated approach up to partnership, professional learning, and scaling in the larger complex and district.

Vertical Alignment: due to our nimble size and iterative model (+100 students / year), we will a) partner with elementary schools to get ahead of anticipated needs, b) collaborate with fellow middle and high schools to develop professional learning communities and shared best practices, and c) integrate college-career programming into our model as appropriate, offering the University of Hawai‘i at West O‘ahu an opportunity to impact children far into their pipeline.

7. Reason for Conversion (Conversion applicants only). Explain the rationale for applying to convert to a charter school.
 - a. How will the charter school model lead to improved academic outcomes and non-academic operations?
 - b. Describe the stakeholder groups that were engaged in the conversion decision making process, and explain their roles in the transition process.

Not applicable because the proposed school is not a conversion charter school.

8. Conversion Transition (Conversion applicants only). Explain if and how any programmatic elements of the school design will change or evolve with the transition to operation as a charter school, as opposed to the current school model.

Not applicable because the proposed school is not a conversion charter school.

B. Enrollment Summary

1. Enrollment Plan. Complete the Enrollment Plan (Exhibit 1), and include it as **Attachment A (required form)**, illustrating the proposed school’s five year enrollment plan. Include a breakdown between students receiving a primarily on-site, face-to-face learning experience

(brick-and-mortar) or *blended learning* and students receiving a primarily *online learning* experience (*virtual learning*).

The Enrollment Plan is provided in **Attachment A**.

- 2. Enrollment Plan Rationale.** Describe the rationale for the number of students and grade levels served in each year and the basis for the enrollment plan illustrated in the attachment. Include a discussion of the rationale for including non-entry level grades. Entry level grades are generally kindergarten, sixth grade, and ninth grade.

‘Ewa Beach schools are overcrowded, especially at the secondary level. However, beginning a 9th grade school in the current charter landscape would be formidable academically, organizationally, and financially. Our rationale is as follows:

- **Assimilation** - Opening in 6th grade will offer an additional year to the middle school experience and prepare students for high school;
- **Existing Models** - We can learn from other charter schools that have recently opened (i.e. SEEQS, Ka‘u Learning Center, Malama Honua) and gain knowledge and insight from their opening and initial years of experience;
- **Culture** - Beginning with 100 students and growing each year will offer us time to evolve our school culture;
- **Surrounding Impact** - 100 students per year will make a minimal impact on surrounding feeder schools;
- **Economies of Scale** - Adding 100 students each year will allow us to gradually increase our enrollment size and leverage economies of scale with regard to per pupil and various state and federal funding streams;
- **Internal Replication** - Adding 100 students each year will allow us to replicate and improve our onboarding procedures for students, families, and staff;

Non-entry level grades (7, 8, 10, 11, 12) are part of our 6-12 continuum linking elementary to middle, high school, and college / career; consistency and continuity in our educational program is important for multi-year student development.

- 3. Enrollment Plan Justification.** Provide evidence justifying the enrollment plan described above. Include the estimated number of students in the geographic area(s) the proposed school plans to serve, including the number of students that currently attend existing schools (both public and private) in the geographic area for the grades the proposed school plans to serve. If research data, censuses, surveys, or other data sources were used, please describe these sources and provide a citation or attach copies of the sources, as **Attachment B (no page limit)**.

In the 2015-16 school year, the Campbell Complex had 10,730 students across seven elementary, two middle, and one high school; in grades 6-12 there were approximately 4,930 students. In addition, five parochial schools serving approximately 650 students exist in the greater ‘Ewa / ‘Ewa Beach area; approximately 400 were in grades 6-12. In total, nearly 5,580 children are in grades 6-12 in ‘Ewa Beach. Please see **Attachment B** - Description, Citations, or Copies of Data Sources Justifying Enrollment Plan for more detail.

II. Academic Plan

A. Academic Plan Overview, Academic Philosophy, and Student Population

1. Academic Plan Overview. Provide a concise overview of the academic plan of the proposed school, including instructional methods, assessment strategies, and any non-negotiable elements of the proposed school's academic plan. Include a brief description of any *virtual* or *blended learning programs*, as defined in Section IV.J of the RFP. Briefly describe any evidence that promises success for this academic plan with the anticipated student population.

The DreamHouse educational model lives at the nexus of high academic expectations, 21st skill building, leadership growth, and identity development in our local community and a global world. These four components are combined to create the DreamHouse Matrix, a guiding pedagogical framework applied to instructional design, student learning, and overall classroom design.

DreamHouse Matrix – the core driver of our model.



- **Inquiry-driven instruction with the student at the experiential center of learning**, leveraging the teacher as a facilitator and supporter in knowledge and skill building through frames of leadership, identity, and community, will serve as a consistent thread between content and grades.
- **Strategies for assessment take micro and macro approaches** at student learning, progress, and data-driven instruction. Assessments will be generated by curriculum and teachers, linked to standards, and will allow for pre-, during-, and post-unit analysis.
- **Non-negotiable to our school model are the four components of the DreamHouse Matrix** and their presence with our classrooms and culture; high expectations for students and adults, designing classroom experiences around skill-building, and empowering leaders who are affirmed in their unique identities are part of our DNA.

2. [Academic Philosophy](#). Provide a concise description of the applicant’s core beliefs and academic values and how those beliefs and values inform the design of key elements of the proposed school.

We believe in the tremendous potential of the children growing up in ‘Ewa Beach and want to see them living empowered lives and writing their own story. We believe in growth mindsets and teachers as facilitators and as learners. We believe the assets and people of ‘Ewa Beach are integral to our students’ journeys.

We value an academic program that is multi-dimensional, focusing on various components of learning and growth on behalf of our students, staff, and school community. Our beliefs and values have been driven by years of experience and dialogue with educators, families, and community members of ‘Ewa Beach. Our family’s high expectations for their children are embedded into the DreamHouse Matrix; our children’s own desire to make change and impact in their community has led us to an intentional focus on leadership and character development; and a deep sense of cultural pride, heritage, and sense of community has led us to identity formation and transformation.

3. [Anticipated Student Population](#). Describe the anticipated student population the proposed school plans to serve, including, among other things, the projected percentage of students eligible for free and reduced lunch. Explain why the proposed school anticipates that the student population described above will enroll in the proposed school. Include, as **Attachment C (5 page limit)**, a listing of the DOE complex area(s) that these students will most likely come from and a listing of both public and private schools with the grades the proposed school plans to offer that are located in the same areas that the proposed school plans to pull its student population from.

As mentioned in the Enrollment Summary, we anticipate serving a predominantly Filipino and Native Hawaiian population from local neighborhoods in the ‘Ewa Beach area. Based on 2015-16 Hawai‘i DOE enrollment data, we see a 46.3% weighted average Free and Reduced Lunch (FRL) population. We anticipate 6-10% of our students will have Special Education (IEP or 504) accommodations and 4-8% of students qualifying as English Language Learners. We have based predictions from research supported by Hawai‘i Department of Education (HIDOE) public

databases, HIDOE School and System Improvement Reports, and the 2013 U.S. Census. Please refer to **Attachment C** for a listing of DOE complex areas and public and private schools where our students will likely come from.

B. Curriculum and Instructional Design

1. A clear description of course outcomes for each course at each grade level.

Middle School. Our middle school will run grades 6, 7, and 8, and will have rigorous standards aligned to high school, graduation, and college/career readiness. Our 6th grade is a catch-all year - students will be entering our program with differing levels of content knowledge and skill mastery; it is our goal to develop students' reading, comprehension, and fluency skills, math and science knowledge, and to leverage social and Hawaiian studies as an opportunity to deepen knowledge of our islands and our world. 7th grade will be a building year, scaffolding ELA and math Common Core standards within Curriculum Research and Development Group (CRDG) curriculum, as well as an additional year of science, social studies, and the introduction of language and theatrical expression. 8th grade will serve to prepare students for a rigorous high school curriculum oriented towards high school graduation, college admission, and career readiness. On average, students will achieve 80% mastery as measured by internal summative assessments and year-end capstone projects.

6th Grade (Year One, 2017-18)

- **English Language Arts** - Reading, writing, speaking and listening standards;
- **Math** - (1) Connecting ratio and rate to whole number multiplication and division and using concepts of ratio and rate; (2) completing understanding of division of fractions and extending the notion of number to the system of rational numbers, which includes negative numbers; (3) writing, interpreting, and using expressions and equations; (4) developing understanding of statistical thinking;
- **Physical Science** - Physical Science (Matter and its Interactions; Motion and Stability: Forces and Interactions; Energy; and Waves and Their Applications in Technologies and Information Transfer);
- **Social Studies** - Historical understanding, history, political sciences and civics, cultural anthropology, geography, and economics;
- **Hawaiian Studies** - Reading, writing, speaking and listening standards (in the context of the CRDG Hawaiian Studies curriculum);

7th Grade (Year Two, 2018-19)

- **English Language Arts** - Reading, writing, speaking and listening standards;
- **Math** - (1) Developing understanding of and applying proportional relationships; (2) developing understanding of operations with rational numbers and working with expressions and linear equations; (3) solving problems involving scale drawings and informal geometric constructions, and working with two- and three-dimensional shapes to solve problems involving area, surface area, and volume; and (4) drawing inferences about populations based on samples;
- **Life Science** - Life Science (From Molecules to Organisms: Structures and Processes; Interactions, Energy, and Dynamics Relationships in Ecosystems; Heredity: Inheritance and Variation of Traits; Biological Evolution: Unity and Diversity);

- **Social Studies (Hawaiian Studies, Pacific Islands)** - Historical understanding, history, political sciences and civics, cultural anthropology, geography, and economics;
- **Fine Arts: Visual Arts, Drama & Theatre, Music (1 semester)** - HCPS III Visual Arts standards-, HCPS III Drama and Theatre standards-, and HCPS III Music standards-driven learning experiences aligned to a yet-to-be-determined curriculum;
- **Language (TBD) (1 semester)** - HCPS III Stage I: 6-8 Language standards focusing on interpersonal, interpretive, presentational, cultures, and comparisons;

8th Grade (Year 3, 2019-20)

- **English Language Arts** - Reading, writing, speaking and listening standards;
- **Math** - (1) Formulating and reasoning about expressions and equations, including modeling an association in bivariate data with a linear equation, and solving linear equations and systems of linear equations; (2) grasping the concept of a function and using functions to describe quantitative relationships; (3) analyzing two- and three-dimensional space and figures using distance, angle, similarity, and congruence, and understanding and applying the Pythagorean Theorem;
- **Social Studies (US History)** - Historical understanding, history, political sciences and civics, cultural anthropology, geography, and economics;
- **Earth & Space Science** - Earth and Space Sciences (Earth's Place in the Universe, Earth's Systems, Earth and Human Activity); Engineering Design components of defining the problem, developing possible solutions, and improving design;
- **Fine Arts: Community Theatre (1 semester)** - To the best of each individual child's ability, each will learn about, engage with, and demonstrate understanding around (1) choice, (2) their own experience, (3) collectivity, (4) and navigating a challenge-oriented environment; this will be achieved through *Theatre of the Oppressed* and (1) creation, (2) collaboration, and (3) actualization;
- **Language (TBD) (1 semester)** - HCPS III Stage I: 6-8 Language standards focusing on interpersonal, interpretive, presentational, cultures, and comparisons;

High School (projected to open SY 2020-21). Our high school will build from the three-year middle school experience and continue work within our model, pedagogy, and vision around identity and leadership in the context of Hawai'i and the 21st century. Beginning in 9th grade and building out a year at a time through 12th grade, our graduates will leave us *affirmed in identity and empowered in leadership*. Our academics will be aligned to Hawai'i Board of Education requirements, as well as entry requirements for competitive colleges; our curriculum and classrooms will engage students in real-world, real-time issues and opportunities within our island community. Students will develop a broad set of leadership, civic engagement, and life skills while developing a strong sense of identity, voice, and place within our larger society. On average, students will achieve 80% mastery as measured by internal summative assessments and year-end capstone projects.

9th Grade (Year 4, 2020-21) (6 credits)

- **English Language Arts 1 (1)** - Reading, writing, speaking and listening standards;
- **Math: Number & Quantity, Algebra (1)** - Number and Quantity (The Real Number System; Quantities; The Complex Number System; Vector and Matrix Quantities), and Algebra (Seeing Structure in Expressions; Arithmetic with Polynomials

and Rational Expressions; Creating Equations; and Reasoning with Equations and Inequalities);

- **Social Studies: Modern History of Hawai‘i (.5), Participation in a Democracy (.5)** - Modern History of Hawai‘i and Participation in a Democracy (Historical Understanding, History, Political Sciences and Civics, Cultural Anthropology, Geography, and Economics);
- **Science: Physical (1)** - Physical Science (Matter and its Interactions; Motion and Stability: Forces and Interactions; Energy; and Waves and Their Applications in Technologies and Information Transfer);
- **PE: Physical Education Lifetime Fitness (.5), Basic Physical Education Elective (.5)** - Physical Education Lifetime Fitness, Basic Physical Education Elective (Movement Forms, Cognitive Concepts, Active Lifestyle, Physical Fitness);
- **Language 1 (1)** - Language standards focusing on interpersonal, interpretive, presentational, cultures, and comparisons;

10th Grade (Year 5, 2021-22) (6 credits)

- **English Language Arts 2 (1)** - Reading, writing, speaking and listening standards;
- **Math: Geometry (1)** - Geometry (Congruence; Similarity, Right Triangles, and Trigonometry; Circles; Expressing Geometric Properties with Equations; Geometric Measurement and Dimension; Modeling with Geometry);
- **Social Studies (1)** - Historical Understanding, History, Political Sciences and Civics, Cultural Anthropology, Geography, and Economics;
- **Science: Life (Biology) (1)** - Life Science (From Molecules to Organisms: Structures and Processes; Interactions, Energy, and Dynamics Relationships in Ecosystems; Heredity: Inheritance and Variation of Traits; Biological Evolution: Unity and Diversity).
- **Health (.5), Expository Writing (.5)** - Core Concepts; Accessing Information; Self Management; Analyzing Influences; Interpersonal Communication; Decision Making and Goal Setting; Advocacy; also, per Expository Writing (I or II) Standards (Conventions and Skills; Rhetoric);
- **Language 2 (1)** - Language standards focusing on culture, comparisons, and interpersonal, interpretive, and presentational language;

11th Grade (Year 6, 2022-23) (6 credits)

- **English Language Arts (1)** - Reading, writing, speaking and listening standards;
- **Math (1): Functions, Modeling / ALG II (1)** - Functions (Interpreting Functions; Building Functions; Linear, Quadratic, and Exponential Models; Trigonometric Functions) and Modeling;
- **Social Studies (1)** - Historical Understanding, History, Political Sciences and Civics, Cultural Anthropology, Geography, and Economics);
- **Science: Earth & Space (1)** - Earth and Space Sciences (Earth’s Place in the Universe, Earth’s Systems, Earth and Human Activity); Engineering Design components of defining the problem, developing possible solutions, and improving design;
- **Fine Arts Elective (1)** - HCPS III Visual Arts standards, HCPS III Drama and Theatre standards, and HCPS III Music standards;

- **Language 3 (1)** - Language standards focusing on cultures, comparisons, and interpersonal, interpretive, and presentational language;

12th Grade (Year 7, 2023-24) (6 credits)

- **English Language Arts (1)** - Reading, writing, speaking and listening standards;
- **Math: Statistics & Probability (1)** - Statistics and Probability (Interpreting Categorical and Quantitative Data; Making Inferences and Justifying Conclusions; Conditional Probability and Rules of Probability; Using Probability to Make Decisions);
- **Social Studies (1)** - Political Science and Government, Sociology, Humanities, Cultural Anthropology, Economics, and Issues facing Hawai'i (translated via American Problems standards);
- **Senior Project, Personal Transition Plan (1)** - All students will complete a) a senior project that is aligned to a rigorous, cross-disciplinary, comprehensive rubric, b) a transition plan focusing on college/career and service/leadership, and c) required hours around identity and leadership work (i.e. mentoring younger students, mentoring adults/teachers, TF'ing a class, designing DH block experiences, etc.);
- **Fine Arts Elective (1)** - HCPS III Visual Arts standards, HCPS III Drama and Theatre standards, and HCPS III Music standards;
- **Language 4 (1)** - Language standards focusing on cultures, comparisons, and interpersonal, interpretive, and presentational language.

2. A clear description of the rigorous academic standards that will be used at the proposed school. The description must include, provided as **Attachment D (no page limit)**, a map or list of each standard that will be addressed in each course at each grade level and demonstrates vertical alignment from grade level to grade level. The description must also include a rationale for inclusion each set of standards that proposed school plans to adopt that demonstrates an understanding of how each set of standards will contribute to the success of student learning under the Academic Plan.

Please refer to **Attachment D** for map of academic standards for each course at each grade level including rationale and vertical alignment.

3. A description of the materials that have been selected and an explanation that clearly demonstrates how the materials support the Academic Plan. For grade levels and courses that do not have curriculum materials selected, a reasonable and sound timeline and description of how the materials will be developed or selected and a list of individuals that will be involved in the development or selection process. If the proposed Academic Plan includes a *virtual* or *blended learning program*, include a clear description of the online learning curriculum program(s) and a reasonable rationale for the selection of the curriculum program(s).

The proposed curricula allow us to leverage the research, knowledge, and contextualization of CRDG while aligning to clear and rigorous state and national standards, all while layering in 21st century skill competencies, leadership and character strengths, and identity development. Please refer to the working unit checklist and unit example that leverages ELA standards, CRDG frameworks, and the DreamHouse Matrix in **Attachment D**.

<p>6th Grade (Year One, 2017-18)</p> <p>(1) English Language Arts (CRDG Language Arts)</p> <p>(2) Math (Connected Math Program)</p> <p>(3) Physical Science (CRDG Science)</p> <p>(4) Social Studies (CRDG Social Studies)</p> <p>(5) Hawaiian Studies (CRDG Hawaiian Studies)</p>	<p>7th Grade (Year 2, 2018-19)</p> <p>(1) English Language Arts (CRDG Language Arts)</p> <p>(2) Math (Connected Math Program)</p> <p>(3) Life Science (CRDG Science)</p> <p>(4) Social Studies (Hawaiian Studies, Pacific Islands) (CRDG Social Studies)</p> <p>(5) Fine Arts: Visual Arts, Drama & Theatre, Music (1 sem) (<i>To Be Acquired / Developed</i>)</p> <p>(6) Language (1 sem) (<i>To Be Acquired / Developed</i>)</p>
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<p>8th Grade (Year 3, 2019-20)</p> <p>(1) English Language Arts (CRDG Language Arts)</p> <p>(2) Math (Connected Math Program)</p> <p>(3) Social Studies (CRDG Social Studies)</p> <p>(4) Earth & Space Science (CRDG Science)</p> <p>(5) Fine Arts: Community Theatre (1 sem) (<i>In Development</i>)</p> <p>(6) Language (1 sem) (<i>To Be Acquired / Developed</i>)</p>
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<p>9th Grade (Year 4, 2020-21) (6 credits)</p> <p>(1) English Language Arts 1 (1) (CRDG Language Arts)</p> <p>(2) Math: Number & Quantity, Algebra I (1) (Connected Math Program)</p> <p>(3) Social Studies: Modern History of Hawai'i (.5), Participation in a Democracy (.5) (CRDG Social Studies)</p> <p>(4) Science: Physical (1) (CRDG Science)</p> <p>(5) PE: Physical Education Lifetime Fitness (.5), Basic Physical Education Elective (.5) (<i>To Be Acquired / Developed</i>)</p> <p>(6) Language I (1) (<i>To Be Acquired / Developed</i>)</p>	<p>10th Grade (Year 5, 2021-22) (6 credits)</p> <p>(1) English Language Arts 2 (1) (CRDG Language Arts)</p> <p>(2) Math: Geometry (1) (Connected Math Program)</p> <p>(3) Social Studies (1) (CRDG Social Studies)</p> <p>(4) Science: Life (Biology) (1) (CRDG Science)</p> <p>(5) Health (.5), Expository Writing (.5) (<i>To Be Acquired / Developed</i>)</p> <p>(6) Language I (1) (<i>To Be Acquired / Developed</i>)</p>
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<p>11th Grade (Year 6, 2022-23) (6 credits)</p> <p>(1) English Language Arts (1) (CRDG Language Arts)</p> <p>(2) Math: Functions, Modeling / ALG II (1) (Connected Math Program)</p> <p>(3) Social Studies (1) (CRDG Social Studies)</p> <p>(4) Science: Earth & Space (1) (CRDG Science)</p> <p>(5) Fine Arts Elective (1) (<i>To Be Acquired / Developed</i>)</p> <p>(6) Language II (1) (<i>To Be Acquired / Developed</i>)</p>	<p>12th Grade (Year 7, 2023-24) (6 credits)</p> <p>English Language Arts (1) (CRDG Language Arts)</p> <p>Math: Statistics & Probability (1) (Connected Math Program)</p> <p>Social Studies (1) (CRDG Social Studies)</p> <p>Senior Project (.5), Personal Transition Plan (.5) (<i>To Be Developed</i>)</p> <p>Fine Arts Elective (1) (<i>To Be Acquired / Developed</i>)</p> <p>Language II (1) (<i>To Be Acquired / Developed</i>)</p>
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- **Curriculum Research and Development Group (CRDG)** - Curriculum materials from CRDG keep our focus, materials, text, and pedagogy here in our community. There will be opportunities to leverage best practices from other models, as well as engage the University of Hawai'i in our implementation. CRDG curriculum is Common Core aligned and scaffolds throughout middle and high school, allowing for vertical integration and strong differentiation ability.
- **Connected Mathematics Program (CMP)** - CMP is a Common Core aligned, research-based curriculum that is rigorous, scaffolded throughout middle and high school, and is being used in multiple schools across Hawai'i. CMP's philosophy is simple: focus on big ideas and the connections among them, teaching through student-centered exploration of mathematically rich problems, and using continuous assessment to inform instruction.
- **Hochman Method (Writing Program)** - Hochman will primarily be used to support English Language Arts and the Expository Writing course. The basic components of the program are (1) sentence strategies to build complexity and clarity, (2) outlines to develop well-structured summaries, paragraphs, expository and argumentative essays, and research papers, and (3) revisions to enhance unity and coherence.

Development Plan - Middle School. The main curriculum need for middle school is in 7th and 8th grades, with gaps in World Language and Fine Arts.

6th Grade: None

7th Grade

Fine Arts - Engage working group via e-mail, phone, and in person with the goal of identifying appropriate curriculum for theatre, performing arts; Lissette Roman, Hawai'i Theatre; Will C of Harvard Graduate School of Education (HGSE); HGSE cohort colleagues → Develop working curriculum, assessment structure, and outcomes during Oct. 2015 - March 2016; April 2016 working components.

Language - Engage working group via e-mail, phone, and in person with the goal of identifying appropriate curriculum for language development; Ed Oshiro and Ewa Makai language teachers' recommendations; Buffy Cushman-Patz at SEEQS recommendation; Aunty Charlene Hoe @ Hakipu'u and recommendation; HGSE professors and language initiatives from HGSE; language curriculum examples → Select 2-3 languages and curriculums to consider by Jan. 2016; check with parents, board, existing schools; leave on table as options until 2017-18 school year;

8th Grade

Fine Arts; Community Theatre - Co-develop curriculum at HGSE with classmates; HGSE cohort colleagues co-developing this curriculum aligned to HCPS III; Lissette Roman, Hawai'i Theatre; Will C (HGSE), performer; Playback theatre; Theatre of the Oppressed pedagogy and format → Develop working curriculum, assessment structure, and outcomes during Oct. 2015 - March 2016; April 2016 working components.

Language - Engage working group via e-mail, phone, and in person with the goal of identifying appropriate curriculum for language development; Ed Oshiro and Ewa Makai language teachers' recommendations; Buffy Cushman-Patz at SEEQS recommendation; Aunty Charlene Hoe @ Hakipu'u and recommendation; HGSE professors and language initiatives from HGSE

→ Select 2-3 languages and curriculums to consider by Jan. 2016; check with parents, board, existing schools; leave on table as options until 2017-18 school year;

Development Plan - High School. Across 9-12, curriculum for electives is still being acquired and will be developed over the initial years of school operation with existing and new teachers. Language curriculum will be vertically aligned. Curriculums that will be developed closer to high school opening (2020) are: Physical Education Lifetime Fitness (9th), Basic Physical Education Elective (9th), Language (9th); Health (10th), Expository Writing (10th), Language (10th); Fine Arts (11th), Language (11th); Senior Project (12th), Personal Transition Plan (12th), Fine Arts (12th), Language (12th).

4. A clear list of academic goals and targets and a description of how the proposed school assesses the progress of individual students, student cohorts, and the school as a whole on the identified goals and targets. The description must clearly explain the how the identified assessments will accurately measure progress toward the identified goals and targets.

Headline: in our first year of Smarter Balanced Assessment (SBA), Hawai'i State Assessment (HSA) testing, and internal testing, our goal is to:

- A. Meet or exceed 2017-18 Campbell Complex goals for ELA, Math, and Science as a school;
- B. Realize smaller sub-group gaps between high-needs and non-high needs students as compared to the district, and;
- C. Help students to achieve individual growth goals as measured by multiple assessment data points.

Campbell Complex Goals and Annual Targets

Per SBA & HSA	ELA (%)	MATH (%)	SCIENCE (%)
<i>2014-15 Campbell Complex Average</i>	<i>47.5</i>	<i>36.3</i>	<i>44.4</i>
2017-18 Campbell Complex Target	61	52	65
2017-18 DreamHouse Goal	> 61	> 52	> 65

Whole School. School-wide goals for the beginning 6th grade cohort of 100 students in the 2017-18 school year are aligned with Campbell Complex 2017-18 complex-wide goals; subsequent years will be re-evaluated and may be adjusted based on what is learned and realized during the 2017-18 academic year. Grades 6, 7, 8, and 11 will be aligned to the Smarter Balanced Assessment (SBA) and the Hawai'i State Assessment (HSA) where appropriate (i.e. ELA, Math, Science), while non-SBA subjects and grades 9, 10, and 12 will be aligned to internal and independent standards-driven assessments. Progress will be measured by diagnostic, mid-year, and summative assessments including, but not limited to, SBA practice tests, SBA official tests, beginning-of-year baseline assessments, unit-end summative assessments, and end of semester / end of year capstone projects.

For all non-Common Core, and non-STRIVE HI tested subjects, students will achieve (on average) 80% proficiency on aligned standards, as measured by semester-end summative projects. Progress will be measured by (1) growth on diagnostic assessments, (2) formative assessments within units, and (3) unit-end summative assessments.

Sub-Group. In addition to setting overall achievement targets for the entire cohort, we aim to close any achievement gaps within our student population during the 6th, 7th, and 8th grades, promoting all students to 9th grade on grade level. Our sub-groups include, but are not limited to, 1) Students with special needs (IEP / 504), 2) English Language Learners (ELL), and 3) Disadvantaged students (as measured by Free and Reduced Lunch threshold). Our initial achievement goals for our 6th grade subgroups (2017-18) will be to realize smaller gaps than peer schools within the complex. We will reassess these goals after our first year while maintaining the pedagogy around closing the achievement gap between all students and specific subgroups.

2014-15 Complex Proficiency Rates & Sub-Group Gaps (per ARCH Data Center)

Sub Group Data Proficiency	ELA (%)	MATH (%)	SCIENCE (%)
<i>Complex Average</i>	47.5	36.3	44.4
Complex Special Needs	12.3	9.6	13.7
Complex ELL	2.4	2.3	5.1
Complex Disadvantaged	35.5	25.2	33.1

Individual Students. Beginning in 6th grade, each student will have a comprehensive data portfolio and dashboard that details mastery, growth, and gap areas across courses, content, and competencies. This portfolio, as part of the Individual Learning and Development Plan for each student, will allow for individual goal setting, monitoring and intervention, and growth assessment / data-driven reflection. As of spring 2016, the *Infinite Campus* platform is under strong consideration, as well as pilot software and platforms being developed and prototyped in the Harvard Business School Innovation Lab.

The following is an initial approach to monitoring and assessing growth for individual students against previously stated targets and goals for non-high needs and high needs students. STRIVE HI and internal summative assessments will be the main data points collected to measure progress across content and grades (note: includes SBA practice tests and end of semester / year summative projects).

Smarter Balanced and Hawai'i State Assessment Years (6th, 7th, 8th, 11th)

Individual	Proficiency Math, ELA, Science*	Other (Internal Summative)
Non-High Needs Student	Meet Standard & Exceed Campbell Complex Growth	80% or greater mastery and greater than one year of growth from beginning of year diagnostic

High Needs Student	Approaching Standard** & Exceed Campbell Complex Growth	80% or greater mastery and greater than one year of growth from beginning of year diagnostic
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* As measured by Level 3 or greater achievement on the Smarter Balanced Assessment

** As measured by Level 2 or greater achievement on the Smarter Balanced Assessment

Non-State Testing Years (9th, 10th, 12th)

Individual	All subjects (Internal Summative)
Non-High Needs Student	80% or greater mastery and greater than one year of growth from beginning of year diagnostic
High Needs Student	80% or greater mastery and greater than one year of growth from beginning of year diagnostic

5. A clear and comprehensive description for how instructional leaders and teachers will use student data to administer, collect, and analyze the results of diagnostic, formative, benchmark/interim, and summative assessments to inform programmatic and instructional planning decisions and make adjustments to curricula, professional development, and other school components. The description must clearly explain the roles and responsibilities of the instructional leadership team in overseeing teachers' progress toward helping students meet their identified goals and targets and clearly describe the formalized process and supports that will enable teachers to reflect on student progress and adjust their instruction accordingly.

We believe in continuous assessment, monitoring, analysis, and programmatic adjustment to best meet the needs of our students and to help support them individually to reach their highest potential. Our data inquiry process will be collaborative and inquiry-based in nature, working to isolate levers in and out of the classroom to push/pull in order to improve student achievement. Three unique processes will be used: 1) **administer & collect**, 2) **analyze & inform**, 3) **adjust & professionally develop**. All three stages may happen simultaneously as the collection of different data points and evolving standards mastery and focus will continue throughout the academic year.

(1) Administer & Collect - Five main strands of data will be focused on to encompass the diagnostic, formative, benchmark / interim, and summative assessment spectrum:

Screening & Benchmark Assessments - aligned to our RTI model and the individual approach we will take with all incoming students, we will utilize multiple reading, literacy, and mathematics diagnostics to gather baseline information as to where our individual students, and where our school, is in terms of proficiency at the beginning of the school year. These assessments will inform Individual Learning and Development Plan (ILD), differentiation, Special Education supports, RTI preemptive supports, and individual goals; we will implement the same assessment at the end of the year in order to gather growth data.

Unit- and Standards-Aligned Formative & Summative Assessments - this is classroom- and unit-based, driven by teachers; data is crucial to maintaining highly differentiated classrooms and supporting

the growth of individual children (e.g. immediately scoring entrance tickets and strategically grouping students for instruction by mastery level).

Smarter Balanced Assessment & Practice SBA - mandatory state test administered online over the spring quarter; practice test will be administered in the fall semester to gather a data snapshot and offer children practice with the interface.

Semester- and Year-End Capstone Projects - cumulative, interdisciplinary, DreamHouse Matrix-aligned, and assessed via multiple modes (teacher, peer, self), the semester- and year-end capstone projects will offer a rubric-based view of students' proficiency across content areas and standards, while incorporating skills and the identity-leadership component of the DreamHouse Matrix.

Individual Learning & Development Plan (ILDP) - upon entering the school, each student will help craft their own individualized learning and development plan which will incorporate both quantitative and qualitative data around the four components of the DreamHouse Matrix, along with personal growth goals, results, and reflections. The ILDP will serve as a working portfolio of student goals, growth, and achievement, while also offering a collaborative entry point for data analysis with students, parents, teachers, and administration; ILDP development can be integrated into classroom work, Dream Block time, and remotely via cloud access.

(2) Analyze & Inform - Four separate entry points will allow for the continuous analysis of data and will help inform practice.

Professional Development (PD) Days (6) - there are six (6) PD days allotted to schools via the HIDOE master schedule (i.e. 2017-18). In the beginning of the year there are four PD days, one of which will be spent for data and assessment planning, professional development, calendaring, alignment, and strategizing around an ongoing conversation grounded in continuous data analysis and incorporation into the practice. We will reconvene for a data day at the beginning of second semester, and then finally have a reflection and close out at the end of the year. These sessions will be collaborative inquiry around student mastery, growth, and improvement.

Staff Huddle Once / Month - at our Wednesday staff huddles, once a month, we will devote time to take a snapshot of data across the school, identify areas of growth, areas of concern, and highlight areas of focus over the next month and series of assessments. These sessions will follow the DataWise and Meeting frameworks designed by Kathy Boudett at the Harvard Graduate School of Education, which employ research-based, practical protocols for collaborative data inquiry and planning.

Instructional Coach Co-Analysis Twice / Month - During the Leadership Development block at least twice per month, the Instructional Coach will partner with individual (or multiple) teachers to dig into current unit formative and summative data, or to take a look at larger assessment pieces, and to analyze together, examine instructional practices leading to this data (among other factors), develop an action plan around data improvement, and to set up time to either a) observe, or b) co-debrief.

ILDP Meetings Five / Academic Year - The Leadership Support Team will lead co-building the ILDP alongside of students and parents, creating a strong understanding how multiple data points are impacting overall achievement and growth. Students, parents, Leadership Support Team, and teachers will revisit the ILDP throughout the year.

(3) Adjust & Professional Development - Built into the data analysis days and timing throughout the year are opportunities to adjust course and to develop professionally in an adult

learning community, while also making adjustments to instruction, sharing and co-developing best practices, and strategizing follow-up, observation, and adjustment. Furthermore, the Leadership Support Team will engage in this process alongside of teachers and actively seek feedback regarding additional professional development opportunities to go deeper.

Assessment & Analysis Map - Below is an annual map of when assessments and analysis / PD would happen around data usage.

Assessments (white background)
Analysis / Professional Development (gray background)

QUARTER I:	<i>August</i>	<i>September</i>	<i>October (1st half)</i>
Diagnostics	Baseline (RTI)		
Smarter Balanced			
Unit-based	Formative	Formative	Formative
Unit-based	Summative	Summative	Summative
Capstone Projects			
ILD P	Baseline & Goals	Ongoing	Ongoing
PD Days	Three (4)		
Staff Huddle	Once	Once	
Instructional Coach	Twice	Twice	Once
ILD P Meetings	Beginning of Year		

QUARTER II:	<i>October (2nd half)</i>	<i>November</i>	<i>December</i>
Diagnostics			Growth (RTI)
Smarter Balanced	Practice Test		
Unit-based	Formative	Formative	Formative
Unit-based	Summative	Summative	Summative
Capstone Projects			Capstone

ILD P	Ongoing	Ongoing	Ongoing
PD Days			
Staff Huddle	Once	Once	Once
Instructional Coach	Once	Twice	Twice
ILD P Meetings	Q1 Huddle		

QUARTER III:	<i>January</i>	<i>February</i>	<i>March (1st half)</i>
Diagnostics			
Smarter Balanced			
Unit-based	Formative	Formative	Formative
Unit-based	Summative	Summative	Capstone
Capstone Projects			
ILD P	Ongoing	Ongoing	Ongoing
PD Days	One		
Staff Huddle	Once	Once	
Instructional Coach	Twice	Twice	Once
ILD P Meetings	Semester I Huddle		

QUARTER IV:	<i>March (2nd half)</i>	<i>April</i>	<i>May</i>
Diagnostics			Final Growth (RTI)
Smarter Balanced		SBA	
Unit-based	Formative	Formative	Formative
Unit-based	Summative	Summative	Summative
Capstone Projects			Capstone
ILD P	Ongoing	Ongoing	Ongoing
PD Days			One

Staff Huddle	Once	Once	Once
Instructional Coach	Once	Twice	Twice
ILD P Meetings	Q3 Huddle		End of Year Huddle

6. A clear description of the instructional strategies that the proposed school will use that adequately explains how these strategies support the mission, vision, and academic philosophy of the proposed school and are well-suited to the anticipated student population. The description must also include the interventions and modifications that will be made to instructional strategies if students are not meeting identified goals and targets. If the proposed school’s Academic Plan contains a *virtual or blended learning program*, the description must adequately explain how the proposed instructional strategies will work with the online learning components to result in a coherent instructional program.

Aligned to the curriculum, standards, and assessment strategy that have been described thus far, the mastery of standards 21st century competencies, leadership and character, and identity development will be realized through aligned, active, and responsive classrooms.

DreamHouse Matrix - The DreamHouse Matrix serves as a compass for the type of instructional design and strategies that will be used day-to-day, for units, summatives, and innovative approaches towards increasing student mastery. The following are some examples and explanation around each quadrant living in the classroom:

Academics - classroom content should be standards-aligned and rigorous; standards should be scaffolded and broken down for differentiation and modification if needed; curriculum used has multiple grade-levels, so if text or lesson needs to be modified to remediate or accelerate, the standards and curriculum exist.

21st Century Learning - driven by the P21 Framework for 21st Century Learning, students should be practicing multiple skills each day in the classroom including, but not limited to: critical thinking and problem solving, communication and collaboration, creativity and innovation, media and tech literacy, and life and career skills such as flexibility, adaptability, initiative, and responsibility.

Leadership & Character - aligned to the integrative leadership model employed at the Native American Community Academy that centers on “developing strong leaders who are academically prepared”, we will provide individual leadership development and learning opportunities within the academic space. Character expectations and development opportunities will be embedded in culture, lesson plans, and assessments.

Identity & Community - connection to the community and each individual child’s self is imperative throughout lesson design, the selection of text, the summative assessment, and the mode through which content is delivered. Teachers will build in options and flexibility into their instructional design so that content delivery and mastery reaches students on a personal, individual level (e.g. the use of a “where I’m from” poem over traditional, European poetry). Furthermore, teachers will be encouraged to guide students in engaging with and leveraging the assets of the community throughout units.

Strategies - educators will utilize a number of the following strategies in order to move students towards mastery, aligned to the DreamHouse Matrix, and centered in student learning by doing:

- Active learning - students learn by creating something;
 - *In practice: students create small structures with cardboard to learn about angles, shapes, and other geometric components*
- Engage community members / guests - ground lessons in the work and culture of the community;
 - *In practice: Kumu Hula joins ELA class to share history and significance of Halau; students journal, share, and reflect together*
- Stations - students engage in a series of stations (4-6) over the course of an 80-minute block and learn different content at different stations;
 - *In practice: one station students are learning working definitions for certain literary devices; one station students are reading a poem and highlighting and interpreting various literary devices; one station students are creating their own poetry with literary devices; one station students are sharing their poetry and offering / receiving feedback*
- Teacher as facilitator - student voice, student learning, and student energy should be driving class learning and momentum; teachers are there to guide, offer brief direct instruction in the form of a mini-unit, and then facilitate student learning, collaboration, engagement, and mastery of material;
 - *In practice: stations; the University of Hawai'i's CREDE program allowed for the development of instructional pedagogy and delivery so that students were engaged in relevant material in a way that significantly removed the teacher from directing the learning process (i.e. students served as support, not only the teacher; questions were directed to other students; assessment and mastery was peer-driven)*
- Guiding questions for student-centered instruction... student should be able to answer, “yes” to: Did I choose it? Is it relevant to my life? Is it authentic? Is there action that I can take? Did I take it? Did it produce change?

Modifications & Interventions - We acknowledge that each student has a different pace and mode of optimal learning; we want to offer multiple entry points and options to demonstrate mastery.

- The majority of our curriculum is vertically aligned (CRDG ELA, Science, Social Studies, Connected Math, and Language) so that text, delivery, and assessments can be pulled from various grade levels;
- Standards used across content areas are all vertically aligned so that pulling from standards at lower and higher grades is possible and coherent;
- Due to the high amount of student interaction and engagement, strategic grouping and pairing is a viable modification for students who need additional support in the classroom;
- For students who need additional support beyond their classmates, we will work to ensure that the teacher has prioritized them for more direct support, that we might have a special education teacher present for part or most of the class period, and finally that this child is supported with identified and self-identified optimal strategies;

7. Graduation Requirements.

- a. A clear description of the course and credit requirements for graduation, including a description of how GPA will be calculated, that meets BOE’s graduation requirements.
- b. If graduation requirements for the proposed school will differ in any way from BOE Policy 4540, an explanation of how they will differ (including exceeding BOE graduation requirements), including compelling reasons and justification for the differences, and a reasonable and sound plan for adjusting graduation requirements (including any necessary adjustments to other components of the Academic Plan) in the event the BOE does not grant a waiver from its policy.

BOE Requirements - Course and credit requirements for graduation are directly aligned to the Hawai'i State Board of Education. In order to graduate from high school, a student must have completed grades 9-12 (D or better) earning 24 credits across required courses, including electives. The following is the HI BOE requirements:

- **4 credits ELA** including: English Language Arts 1 (1.0 credit); and English Language Arts 2 (1.0 credit); and Expository Writing (0.5 credit); and English Language Arts basic electives (1.5 credits)
- **4 credits Social Studies** including: U.S. History and Government (1.0 credit); and World History and Culture (1.0 credit); and Modern History of Hawaii (0.5 credit); and Participation in a Democracy (0.5 credit); and Social Studies basic elective (1.0 credit)
- **3 credits Math** including: Algebra 1 (1.0 credit); and Geometry (1.0 credit); and mathematics basic elective (1.0 credit)
- **3 credits Science** including: Biology 1 (1.0 credit); and science basic electives (2.0 credits)
- **2 credits** in one of the following areas: World Language, Fine Arts, CTE, JROTC (2.0 credits)
- **1 credit P.E.** including Physical Education Lifetime Fitness (0.5 credit); and Physical Education basic elective (0.5 credit)
- **0.5 credit Health** in Health Today and Tomorrow
- **0.5 credit** Personal Transition Plan
- **6 credits Electives** (Any Subject Area) Senior Project may be counted toward 1.0 elective credit

<p>9th Grade (Year 4, 2020-21) (6 credits)</p> <p>(1) English Language Arts I (1) (2) Math: Number & Quantity, Algebra (1) (3) Social Studies: Modern History of Hawai'i (.5), Participation in a Democracy (.5) (4) Science: Physical (1) (5) PE: Physical Education Lifetime Fitness (.5), Basic Physical Education Elective (.5) (6) Language I (1)</p>	<p>10th Grade (Year 5, 2021-22) (6 credits)</p> <p>(1) English Language Arts II (1) (2) Math: Geometry (1) (3) Social Studies (1) (4) Science: Life (Biology) (1) (5) Health (.5), Expository Writing (.5) (6) Language II (1)</p>
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<p>11th Grade (Year 6, 2022-23) (6 credits)</p> <p>(1) English Language Arts (1) (2) Math: Functions, Modeling / ALG II (1) (3) Social Studies (1)</p>	<p>12th Grade (Year 7, 2023-24) (6 credits)</p> <p>(1) English Language Arts (1) (2) Math: Statistics & Probability (1) (3) Social Studies (1)</p>
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(4) Science: Earth & Space (1)	(4) Senior Project, Personal Transition Plan (1)
(5) Fine Arts Elective (1)	(5) Fine Arts Elective (1)
(6) Language III (1)	(6) Language IV (1)

GPA Calculation

Grade	GPA Points	Grade	GPA Points	Grade	GPA Points
A (94-100)	4.0	B- (80-83)	2.6	D+ (67-69)	1.3
A- (90-93)	3.6	C+ (77-79)	2.3	D (64-66)	1.0
B+ (87-89)	3.3	C (74-76)	2.0	D- (60-63)	0.6
B (84-86)	3.0	C- (70-73)	1.6	F (< 60)	0.0

In accordance with BOE Policy, we propose the following GPA structure. Cumulative GPA will be calculated using a weighted average of 1) credits and 2) semester- or year-end grades.

8. [Virtual and Blended Learning.](#)

These criteria are not applicable because the proposed school does not contain a virtual or blended learning program.

C. Special Populations and At-Risk Students

1. An outline of the overall plan to serve *educationally disadvantaged students* and students with special needs that demonstrates an understanding of, and capacity to fulfill, state and federal obligations and requirements pertaining to *educationally disadvantaged students* and students with special needs, including but not limited to the following subgroups: students with IEPs or Section 504 plans; ELL students; students performing below grade level; students identified as intellectually gifted; homeless students; and students at risk of academic failure or dropping out. The plan must identify any other special needs populations and at-risk subgroups that the proposed school expects to serve, whether through data related to a specifically targeted school or geographic area or more generalized analysis of the population to be served, and describe the evidence or data that was used to determine that the proposed school should anticipate serving the population.

Our Vision for All Students - All children, no matter their ability level, will be provided a safe, conducive environment to learn. Supported by the work of Carol Dweck around growth vs. fixed mindsets, we believe in growth - a growth orientation for students who are both ahead and behind grade level, a growth mindset for all students and adults, and a growth orientation for our instructional pedagogy and practice; thus, we believe that all children, with the appropriate supports and interventions, can achieve to the best of their abilities. Each student will feel safe, challenged, and supported through our academics and school culture.

Our Approach to Support - Our Response to Intervention (RTI) model will be both preemptive and intervention-based, allowing for multiple support strategies for individual students, sub-groups, and our school as a whole. Our three-tier support system begins with pre-screening including diagnostic assessments, individual meetings, family engagement, and a detailed, Individual Learning and Development Plan (ILDLP) for every student (housed on *Infinite Campus*); at this time we will surface existing Individualized Education Plans (IEP) and 504 plans to be taken into consideration for tier planning and modification. An overview of the tiering system is below:

Pre: Design Individual Learning and Development Plan for all students aligned to DreamHouse Matrix

Tier 1: Highly differentiated instructional strategies and classroom environment

Tier 2: Targeted interventions (small group)

Tier 3: Intensive Interventions (one:one reading, external support, in-depth improvement plan)

“Now Clause” - this is an option for students, parents, teachers, and school members to request immediate additional support for a student; modification or intervention could be necessary given an unexpected event or trauma facing the student, an immediate drop in performance, or other exceptional circumstance that would warrant immediate tiering changes.

Our Plan - Our plan is broken into three phases: (I) start of academic year, (II) during academic year, (III) end of academic year. Within each phase, there are multiple stakeholders involved and there are multiple actions being taken to implement, improve, and adjust our RTI model in support of all children at our school. This plan will be driven by the members of the Leadership Support Team; the Operations Manager will take lead in scheduling, logistics, and general support; the Special Ed Lead will take lead on relationship manager with families and RTI integration into the classroom; the Instructional Coach will support the Special Ed Lead and teachers in RTI support, intervention, and integration; and the School Director will a) coach and support the Leadership Support Team, b) engage support partners, and c) initiate strategic planning and development around our RTI model including effectiveness review, analysis, and best practice evolution.

Beginning of Year: Phase I		
Students & Parents	Teachers & Leadership Support Team	Partners
<ul style="list-style-type: none"> - Meet with student & family to discuss year, needs, develop ILDP - Discuss and strategize IEP and 504 (if applicable) - Calendar first meeting / follow-up - Connect student & family with additional supports and resources (community, 	<ul style="list-style-type: none"> - PD before start of year focused on pedagogy, calendar, screening, tiers, referrals, and the “now clause” - PD around highly differentiated classrooms - Uploading student information and legal components (IEP, 504) - Norming on discipline policy - Upload and share data points and initial accommodations with staff; engage 	<ul style="list-style-type: none"> - Identify partners (Nonprofit, state, complex, national) who will support families - Engage partners in collaborative support - Build bridges between partners

state, complex)	in analysis and planning	and families
Student enters screening protocol (see “Screening Protocol” below)	Co-build accommodations protocol and approach for all students	Engage partners in initial conversations; link families

During Year: Phase II		
Students & Parents	Teachers & Leadership Support Team	Partners
<ul style="list-style-type: none"> - Check in with parents 1x / mo. to update on students progress, tier of support - Host IEP/504 meetings per state and federal standards - Engage students in revisiting ILDP (Infinite Campus) and reflecting upon / updating progress, goals - Offer parents the opportunity to enact “now clause” - immediate additional intervention / support based on circumstances; proceed 	<ul style="list-style-type: none"> - Wednesday Huddle: engage all teachers and staff in investigating and analyzing student supports, interventions (existing and flagged), modifications, and overall trends at the school (this is looking through a window at our school) - Engage in reflective and self-assessment work to examine our own impact on RTI snapshot (mirror work; what role do we play?) - Leadership Support - additional analysis and support for teachers who are noticing high levels of RTI intervention, modification, reporting 	<ul style="list-style-type: none"> - Engage partners in observing, collaborating (Wednesday Huddles, parent meetings) and offer window into school site - Share data snapshots (confidentially / anonymously) so that partners can assess school RTI climate

End of Year: Phase III		
Students & Parents	Teachers & Leadership Support Team	Partners
<ul style="list-style-type: none"> - End-of-year meeting, reflection, and goal-setting / modifications for next academic year with family - End of year celebration and reflection with student - Changes to IEP / 504 - Update ILDP and set plan for growth / learning over the summer 	<ul style="list-style-type: none"> - Review results of end of year meetings with parents, students - Assess effectiveness of supports, interventions, and modifications; adjust as necessary - Review overall student tier movement; assess student data and results (window) - Engage in reflective and collaborative process investigating our piece in this (mirror) - Leadership Support - additional analysis and support for teachers; next 	<ul style="list-style-type: none"> - Share successes from students and families with partners - Engage partners in end-of-year closeout, reflection, and adjustment meetings - Engage partners in co-planning and vision-alignment for the next year - Engage new partners; deepen network of support

	steps	for students and families
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Screening Protocol (the “PRE” in our RTI system) - Before any response to intervention, before any consideration for modification, and before any talk of special needs and services, we need to establish a data snapshot of our school and a baseline for our students in literacy, comprehension, and fundamental mathematics. Our screening protocol, which will commence at the beginning of the year, will allow for us to establish a baseline, set benchmarks, measure growth throughout the year, and ultimately serve as an overall achievement data point at year’s end.

	WAVE 1 (August)	WAVE 2 (December)	WAVE 3 (May)
Purpose	Gather baseline for reading and math understanding, grade level, and gap areas	Measure growth in reading and math level aligned to start-of-year assessment	Measure overall growth and achievement for students, subgroups, and school aligned to diagnostic
Student Action	Take assessments - ELA (e.g. STEP, FIP, DRA); Math (e.g. STAR TerraNova, MAP); co-set ILDP goals	Re-take assessment; reflect on performance, assess growth / gaps, and revamp ILDP	Re-take assessment; reflect on performance, assess growth / gaps, and revamp ILDP for next grade; set summer goals
Leadership Support, Teacher Action	Identify growth, gaps, and obtain data for analysis and planning for semester one <i>(Consider iReady to monitor progress)</i>	Identify growth, gaps, and obtain data for analysis and planning for semester two <i>(Consider iReady to monitor progress)</i>	Identify growth, gaps, and obtain data for analysis and planning for next year <i>(Consider iReady to monitor progress)</i>
Outcome	Each student has baseline, 100-student cohort is mapped, unit/lesson data obtained, data analysis and data-driven decision making protocol normed	Students, subgroups, and overall cohort have growth data and students, teachers, and Leadership Support Team can measure growth / address gaps	School has data point for overall achievement for the year, reflection protocol exercised, students and families briefed, and goals for next year revised / set

Fluid Tiering Response System (Tiers I, II, III in our RTI system) - We believe in students learning in the least restrictive environment; we will utilize a fluid model of differentiated support and modifications that may include specific supports, pull-in/-out as necessary, and minimal sub-separate strategies (only when absolutely necessary). We believe in integrated learning and inclusion classrooms that highlight students’ strengths while ensuring a culture of growth and support for all students. Our Special Ed Lead will own and drive this model.

From our Wave 1 screening protocol, we will have a baseline as to which students may need additional supports from the beginning of the school year. This way, we can offer pre-emptive supports so that we are not catching them as they fall behind. Our tiering structure will follow the following protocol:

(I) Identification - this will happen primarily at the beginning of the year when we gather diagnostic screening data, IEP and 504 plans, and additional information from students and parents upon entrance. We will identify which students should enter the school on which tier of identified support. This may also happen during the year, as some students on lower tiers of support may need increased intervention and support throughout the year.

Tier I - if a student is on or close to grade level and has no specific learning needs, they will enter in and remain on tier I until identified as needing modification or intervention; this may be considered “general ed” and will be supported with highly differentiated instructional strategies and classroom environments;

Tier II - if a student is more than one year behind in either Math or English, or begins to fall behind in formative and summative assessments (D or lower), this child will be identified in our tier II support stage and may be referred for targeted interventions such as small group learning and/or support from Special Ed teacher;

Tier III - if a student is two or more years behind in Math or English, or begins to fall behind in formative and summative assessments (D or lower), this child will be identified as possibly needing tier III supports and more intensive interventions including one:one reading and tutoring, possible external support, and an in-depth improvement plan.

Accelerated - if a student is more than one year ahead of grade level in Math or English, this child will be recognized as accelerated and will receive additional enrichment opportunities at school, off-site via community partnerships, and potentially with higher education levels (local high school, UH West O‘ahu, LCC). Unrestrictive also means “limitless”, and we aim to provide upward differentiation and opportunities for all of our students.

If a student joins us and is 4+ years behind grade level, we will initiate the “now clause” and bypass any tiering protocol and, with the family’s support, move directly to an evaluation protocol to assess for specific learning needs, diagnoses, and official support strategies.

(II) Referral - the referral process serves as an entry point to identification for parents, teachers, administrators, and students. It norms and eases the process of receiving additional supports, without making it taboo to move up the tier structure or to ask for help. We envision the following entry points and processes for referral of a student who may need additional supports:

Parents - at the beginning of the year, parents will be provided with a website, e-mail, and phone number to call to inquire about modifications or interventions for their child; we will give parents an opportunity to offer information, welcome them to observe their child in the school setting, and engage them in conversations to gain additional insight and align on what we are all seeing.

Teachers - teachers are our main point of contact in the classroom and will have perhaps the best line of sight into a child’s performance; we will provide avenues (similar form structure, template, open door) for teachers to show data backing identification and referral, to show what

the teacher has done on tier I, to leverage resources (Special Ed teacher, parent engagement), and to ultimately make a case for a tier change or intervention.

School - other individuals at the school can follow a similar protocol as teachers if they feel a child may need additional modifications of interventions.

Student - individual students will be encouraged to ask for help and to identify areas where they may need support; if a student is struggling or sees gaps in their performance, they are welcome to self-refer or refer peers in a supportive manner, following a similar protocol as teachers, as well as teacher check-ins, ILDP goals and monitoring, trying new approaches and strategies, or exercising the “now clause” and asking for immediate support.

(III) Structure & Steps - this will be the overall timeline and approach to what happens after a referral, decision, and initiation of tier modifications. Tiers are fluid, so students can transfer in between TIERS depending on their performance and need; this keeps the structure real-time and adaptive to current and anticipated student need.

If Referred to...	This will happen...	Timeline	If it is not working...
TIER I	<ul style="list-style-type: none"> - Highly differentiated instructional strategies and classrooms - One-on-one check-ins with teacher - Home communication 	2-4 weeks	TIER II
TIER II	<ul style="list-style-type: none"> - TIER I +... - Targeted interventions such as small group learning and/or support from Special Ed teacher - Platform support (iReady, ST Math) 	4-6 weeks	TIER III
TIER III	<ul style="list-style-type: none"> - TIER II +... - One:one mentoring and support - Strategically engaging external partners in complex, state, and community circles - More intensive improvement strategies and planning with resources (e.g. “Do the Math NOW”, Phonics BOOST) 	6-8 weeks	Evaluation
Evaluation	<ul style="list-style-type: none"> - Engage family, Special Ed Lead, teacher(s), evidence (data, qualitative), and previous interventions - Proceed through state IEP guidance framework for evaluating student for IEP 	TBD	IEP
IEP	<ul style="list-style-type: none"> - Design comprehensive IEP services to support additional needs for student - Engage Evaluation stakeholders (e.g. social worker, speech pathologist, etc.) in strategically planning 	TBD	TBD

	support, modification, measurement, and re-evaluation		
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This comprehensive structure and process has been designed to keep us (stakeholders) from referring students prematurely to IEP services or 504 modifications. We believe in the potential of all students to thrive in the appropriate environments, and we want to place the onus and responsibility to design those environments for our children without labeling them or moving them into a pathway or track that could restrict their learning environment, development, or potential.

Considerations - Our overall RTI model is designed to support *all* students. However, we realize that certain trends and themes of support emerge for identified and unidentified groups, and we aim to strategize and align support for children falling into the following groups:

1. **Legal** - IEP, 504
2. **Far Behind** - below grade, at risk to drop out
3. **Far Ahead** - accelerated
4. **Unique** - ELL, homeless, gender identity, trauma, military, disadvantaged, additional

With regard to these subgroups, we can align services and efforts in a way that support multiple students, finding synergy in our support methods. The following is a brief rationale and explanation of each group, with deeper analysis and strategy coming in the sub-group plan and explanation.

Legal - IEP, 504 - An unknown number (est. 6-10%) of our students will come to our school with IEPs and 504 accommodations from elementary school. We will honor these needs, as well as our legal obligation to provide the necessary supports. This bucket will be the primary focus of our Special Education Lead and teachers in order to ensure proper, legal support.

Far Behind - below grade, at risk to drop out - Students finding themselves far behind grade level, regardless of the circumstance, will identify with this bucket, although there may be overlap with other groups as well (i.e. a student with an IEP could be far behind). Tiering protocol and academic intervention and monitoring will be the initial focus with students in this bucket, with additional supports being considered as needed.

Far Ahead - Accelerated - These are our students who have come to us with existing higher achievement, have accelerated through our program, and / or are ready for higher level content. Tier one of our RTI model focused on highly differentiated classrooms, which will give these students additional, ability-appropriate learning opportunities, but we will also seek to open additional, out-of-class opportunities to meet the cognitive demands of these students. Lastly, as is aligned to our model and DreamHouse Matrix, we will encourage and support these students to be leaders within the classroom and school, helping improve their and classmates' achievement and success.

Unique - ELL, homeless, gender identity, trauma, military, economically disadvantaged, additional - This bucket is for students who have unique needs such as being new to Hawai'i / the U.S. and need to develop fundamental English literacy and comprehension, students who are grappling with gender identity issues, students who may have been subjected to trauma in their life, students from military families, students growing up in poverty and

additional challenges that may arise. Each student, each group faces unique challenges and will need unique internal and external supports, which we will recognize, honor, and support.

Evidence or Data Use - Our founding board has deep personal experience rooted in teaching, supporting, and parenting children with special needs. Beyond our experience and perspective, we have grounded our model in recent data and trends within the ‘Ewa Beach community as provided by HIDOE, ARCH ADC, STRIVE HI reports, and SBA assessments.

2. For **each** of the aforementioned subgroups of students with special needs (and any other subgroups the applicant identifies), a comprehensive and compelling plan or explanation for:
 - a. The percentage of the anticipated student population that will likely have special needs and how the evidence or data that was used to make this determination was derived;
 - b. The curriculum, daily schedule, staffing plans, instructional strategies, and resources that will be designed to meet the diverse needs of all students;
 - c. Methods for appropriate identification of potential students with special needs, how these methods will be funded, and how misidentification will be avoided;
 - d. Specific instructional programs, practices, and strategies the proposed school will employ to do things like provide a continuum of services; ensure students’ equitable access to general education curriculum; ensure academic success; and opportunities the proposed school will employ or provide to enhance students’ abilities;
 - e. Monitoring, assessing, and evaluating the progress and success of students with special needs, including plans for ensuring each student with special education needs attains IEP goals and for exiting ELL students from ELL services;
 - f. For proposed schools that have a high school division, plans for promoting graduation;
 - g. Plans to have qualified staff adequate for the anticipated special needs population, especially during the beginning of the first year; and
 - h. If the proposed school’s plan contains a *virtual or blended learning program*, a clear description of how the virtual component addresses students with special needs, which may include IEP meetings and modifications, as necessary, for transitioning to a fully or partially online learning program.

Legal (IEP, 504)	Far Behind (below grade, at risk to drop out)	Far Ahead (accelerated)	Unique (ELL, homeless, gender identity, trauma, military, economically disadvantaged, additional)
<i>a. The percentage of the anticipated student population that will likely have special needs and how the evidence or data that was used to make this determination was derived;</i>			
Based on SSIR reports from the 2014-15 school year, as well as	Based on 2014-15 STRIVE HI data for 5th graders in the Campbell	We are anticipating less than a quarter of our students being	Based on SSIR reports from the 2014-15 school year for ‘Ewa Beach, we are anticipating a 50%+ FRL

<p>Special Ed figures from HIDEOE for 2015-16, we are anticipating appx. 6-10% of our students having IEP or 504 plans.</p>	<p>Complex - ELA (52%), Math (35%), Science (51%, 4th grade) - we anticipate 1/2 - 2/3 of our students coming in below grade, with a minority of those students at risk of dropping out.</p>	<p>accelerated based on STRIVE HI gap and proficiency rates for the Complex; this could change depending on our recruitment, lottery, and incoming cohort.</p>	<p>population and 4-8% ELL. There is a larger military population around Iroquois Point, so depending on lottery numbers and neighborhood recruitment, we will better know our military population; trauma, gender identity, and additional groups are to be determined.</p>
<p><i>b. The curriculum, daily schedule, staffing plans, instructional strategies, and resources that will be designed to meet the diverse needs of all students;</i></p>			
<p>Vertical standards and curriculum; block scheduling (80 minutes) and special ed teacher support in classrooms offers extended time and additional personnel resources to assist students with legal time, resource, and modification needs.</p>	<p>Similar to legal, although with additional lens towards “far behind” academic proficiency and ability to remediate standards and curriculum levels to meet student needs; Special Ed teachers will be aware of these students’ needs as well; school staff will have these students flagged as well for additional data screen and monitoring.</p>	<p>Block scheduling with upward differentiation into future standards and curriculum, as well as external resources (community, college partnerships) allows for students to have “limitless learning”; instructional strategies and classroom design gives these students opportunities to teach / lead as well.</p>	<p>Our ELL students will need additional language supports to be determined, and may benefit from literacy and comprehension strategies used for other students; block scheduling and differentiated instruction allows for students to demonstrate proficiency in a variety of ways. Additional resources from the community and Complex will be tapped for this group, including support for children of military families, gender identity affirming support and mentorship.</p>
<p><i>c. Methods for appropriate identification of potential students with special needs, how these methods will be funded, how to avoid misidentification;</i></p>			
<p>Please refer to DreamHouse RTI Model for identification and referral protocols. Funding for assessments, support, and personnel will come from general budget and is identified in financial plan. Misidentification is actively guarded against due to the rigor and depth of our RTI tiering and procedural structure, allowing for multiple perspectives, supports, timelines, and stages before moving towards any type of referral or IEP initiation process.</p> <p>Additionally, with individual cases for children struggling with gender identity, unique</p>			

traumas happening at home or in the community, homelessness or family-centered issues, and additional circumstances, we will partner with local community organizations, Complex personnel, and state personnel.

d. Specific instructional programs, practices, and strategies the proposed school will employ to do things like provide a continuum of services; ensure students' equitable access to general education curriculum; ensure academic success; and opportunities the proposed school will employ or provide to enhance students' abilities;

Strategies to ensure equitable access to education, academic success, and ability enhancement:

1. **Vertical curriculum** aligned to vertical standards allowing for standards- and curriculum-based differentiation;
2. **Highly differentiated instructional strategies and classroom environments** offering students multiple opportunities to express proficiency;
3. **Special Education Lead and Instructional Coach** who will help lead efforts in horizontal alignment of strategies and classroom delivery to ensure school culture, learning environment, and student experience is coherent across content and grade levels;
4. **Dream Block** four times per week offering students interdisciplinary opportunities aligned to DreamHouse Matrix (academics, 21st century skills, leadership/character, identity/community) to build skills and exercise knowledge outside of the classroom and across student cohorts;
5. **Build one cohort at a time**, offering opportunity for students, teachers, admin, and parents to refine instructional programs, practices, and strategies as the year progresses and as we build on top of 6th grade, to 7th, and onward;

e. Monitoring, assessing, and evaluating the progress and success of students with special needs, including plans for ensuring each student with special education needs attains IEP goals and for exiting ELL students from ELL services;

<p>Stakeholders will highlight modifications at year's start and will strategize and calendar IEP monitoring and evaluation checkpoints (Special Ed Lead); ILDP, screening will serve as primary data points.</p>	<p>Stakeholders will assess appropriate tier and support strategy at beginning of year, and monitor growth through assessment flow, screening, ILDP, and student / family engagement.</p>	<p>Students who are 1+ years ahead will be given accelerated material aligned with standards and curriculum, opportunities to engage in external community and college partnerships, and classroom leadership / teaching opportunities.</p>	<p>ELL students will receive additional Complex-provided support and will be assessed along with screening waves to determine ELL eligibility; our tiering strategy will support ELL students with an additional lens towards literacy; unique populations will follow RTI model and tiering protocol; we will engage external support as needed for additional unique populations and circumstances.</p>
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f. For proposed schools that have a high school division, plans for promoting graduation;

<p>Beginning in 6th grade, we will embed modifications and structures to support students in their promotion from grade to grade; RTI model / TIER supports along with additional external stakeholders will work together to build a support network for students with specific needs. Strong alignment, trajectory, data management, IEP / 504 evaluations, and communication will support promotion.</p>	<p>We will identify gaps in learning and grade-readiness through our screening and RTI identification and referral process; based on that information, we will develop plans with stakeholders to accelerate student achievement and catch student up to grade level on a path towards high school graduation; case-by-case basis will be considered, but generally an F in any class, non-proficiency across ELA, Math, and Science, or disregard for skill, identity, or leadership work.</p>	<p>Accelerated students will be closer to HS graduation earlier and we will work to give them upwardly differentiated experiences such as college credit, external opportunities, internships, and leadership positions within the school.</p>	<p>Our ELL cohort will need targeted language intervention and support from early grades with strategic scaffolding towards HS graduation; we will engage external partners and complex support from 6th grade; we will rely on existing external supports for our military population as well; homelessness and poverty come with additional financial burdens that we will help alleviate through community partnerships and college support / access programs; we will support our trauma cohort with expert services in-Complex and from the state to deal with student experience on a case-by-case basis, nurturing a safe environment to promote students within; gender identity and additional needs will be supported internally through our RTI model and via mentoring and to-be-determined supports.</p>
<p><i>g. Plans to have qualified staff adequate for the anticipated special needs population, especially during the beginning of the year;</i></p>			
<p>Multiple founding board members with Special Education degrees, experience, and training - setting up strong management; our leadership structure incorporates a Special Education</p>	<p>We are seeking staff with experience, training, and licensure in areas of supporting students from our unique population (current teachers in ‘Ewa Beach, from communities working with</p>	<p>We are hiring for teachers who have experience or capacity to teach highly differentiated classrooms and promote “limitless learning”; we also will engage community and Complex partners in scaffolding</p>	<p>We will engage with Complex support for ELL services as well as hire for ELA and Special Ed teachers who have ELL teaching experience or capacity; military partnership in and outside of the DOE will be critical in supporting our military cohort; with regard to homelessness and trauma, additional support services (community, Complex, and state) will be leveraged to</p>

Lead who will be brought on to design and administer IEP / 504 accommodations from start of year.	similar population, etc.).	vertically to allow for accelerated learning opportunities for our advanced cohort.	engage professional help; for economically disadvantaged, gender identity, and additional needs, we will hire for values, empathy, and ability to connect with and support <i>all</i> students.
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3. A clear illustration of how the proposed curriculum and Academic Plan will accommodate the academic needs of students performing below grade level and a clear description of the supports and instructional strategies beyond special education that will support underperforming students in meeting and exceeding standards.

Please refer to the DreamHouse Response To Intervention Model (RTI) in part C.1 for a detailed overview and system of supports and instructional strategies that will support underperforming students (and all students) in meeting and exceeding standards as aligned to our curriculum, standards, and Academic Plan.

4. A clear description of how the proposed school will identify students who would benefit from accelerated learning opportunities through its assessment of students’ needs, a clear illustration of how the proposed curriculum will accommodate those performing above grade level, and a comprehensive description of the supports and instructional strategies that will ensure these students are challenged and able to access the level of rigor that aligns with students’ individualized needs.

Please refer to part C.2 for a detailed overview of how DreamHouse will identify students who would benefit from accelerated learning opportunities including identification and assessment, curriculum accommodation, supports and instructional strategies, and additional efforts to challenge students and provide advanced rigor aligned with students’ individualized needs.

D. School Culture

1. A clear and coherent description of the shared beliefs, attitudes, traditions, and behaviors of the proposed school community, and a detailed plan describing how these shared beliefs, attitudes, customs, and behaviors will be developed and implemented and create a school culture that will promote high expectations and a positive academic and social environment that fosters intellectual, social, and emotional development for all students.

Driven by years of teaching, community meetings, and listening, our team has synthesized the following: the identity of every child, the community from which they come, and the individual leadership potential within every child is central to the families and community of ‘Ewa Beach. This will be our work.

Traditions and Behaviors - As an applicant group, we recognize and honor the historical and cultural significance of the ‘Ewa Beach (e.g. settlement in the Honouliuli plain, division of the Honouliuli Ahupua‘a, the emergence of ranching, sugar cane cultivation, and farming). There is a strong Hawaiian and Filipino culture that runs deep in ‘Ewa Beach; it is reflected in our student demographics, within community gatherings and celebrations, and amidst daily life.

The traditions that exist in the community, whether they be Sunday church, youth football, Hālaus, or the countless other spoken and unspoken traditions that exist within the community, our focus is honoring what our students and families bring into school every day.

Development of Shared Beliefs, Attitudes, Customs, and Behaviors - Our school culture has already begun forming; it began with teaching in ‘Ewa Beach, with meeting with parents, families, students, leaders, and educators to collaboratively design our vision, and with working alongside of these stakeholders to build this school. We will continue to develop these values through community meetings, an inclusive board, hiring, professional development, and curriculum development.

Implementation of Shared Beliefs, Attitudes, Customs, and Behaviors - Implementation of these components is essential for establishing culture during our initial launch year (2017-18), as well as maintaining that culture throughout the growth of our school. To maintain and build this culture, we hope to continue community conversations, build a local board, support intrapreneurial development, and engage aligned partners.

Alignment to high expectations, a positive academic and social environment - Because we will support a rigorous, standards-aligned, vertically-integrated curriculum that scaffolds to college and career readiness, our academic environment will be one that balances challenge with support; growth with encouragement.

We believe in all children having the opportunity to say yes or no to college their senior year, and being ready for a productive, successful career upon high school graduation. With a comprehensive approach to RTI and all-student support, we maintain a growth-oriented culture. Additionally, an emphasis on 21st century skill development and structured student interaction allows for us to grow social skills in an academic environment.

Our DreamHouse Matrix heavily features the identity of our students, as well as the community we live in; we believe honoring and fostering a sense of self and commitment to our community is central to a positive academic and social environment. Additionally, character strengths and leadership competencies are central to emotional and social capacity; students exploring strengths, developing gaps, and doing so in a supportive, monitored environment will support the development of our culture and empower our children as keepers of this culture.

2. A sound plan for developing a proposed school culture that is conducive to a safe learning environment for all students and how the proposed school will adequately identify, assess, monitor, and address the social, emotional, behavioral, and physical health needs of all students on an ongoing basis.

We know that in order to support our students in pursuing academic success and college and career readiness, they must feel safe, welcome, and of our school community. We ground our theory in Maslow’s Hierarchy of Needs and believe that mental, physical, and emotional safety are key ingredients to students’ self-actualization, growth, and learning.

Building the Culture - Hiring, governance policies, school policies, classroom environment expectations, professional development, expectations and accountability, and other core

components of our school will be developed through our DreamHouse Matrix. Alignment to our vision of affirmation and empowerment, as well as key components of this matrix, ensures that our staff, board, and families are aligned.

Identification, Assessment, Monitoring of Social, Emotional, Behavioral, and Physical Health Needs - These steps will primarily align with our RTI model described in II.C focusing on students with special needs. The vision we have for students, as well as the tiering structure and identification protocols allows for entry points and engagement with this culture of safety for students, parents, teachers, and administrators.

Lenses - Individual, Collective, School Wide Culture - As we consider the various components of maintaining a safe, positive school culture, we consider the complex layers of this charge, including, but not limited to: (1) individual safety and belonging, (2) collective student body and subgroup safety, and (3) school-wide or institutional safety.

(1) Individual Safety, Well-being, and Belonging - We believe that a strong sense of purpose in our school, clear guidelines and policies for students, high expectations for our students to respect and welcome on another, coherence of moving parts of our school to our mission and vision, and ultimately the modeling of and adherence to these concepts by adults as well, is central to our philosophy around building a safe space for students.

(2) Collective, School Wide Culture - We will establish a strong, safe, collective community through values alignment, trust and community building at the very beginning of the year, clear and high expectations for supporting this community, clear procedures and repercussions for disrupting or disrespecting this community, and clarity around our collective charge to maintain, develop, and model safety and support as a school community.

(3) Physical and Institutional Safety - Physical safety from threat of physical violence either from inside or outside of our school community will be dealt with seriously and swiftly based on federal, state, and HIDOE prescribed guidelines. We will develop and discuss safety protocol at the beginning of the school year based on facility, location, current events, and other extenuating factors.

3. A reasonable and sound plan for the school culture and staff that will intentionally expose students to post-secondary educational and career opportunities at all grade levels. The plan must identify the curricular or extracurricular programs that will provide students with access to college or career preparation and include research-based evidence that these programs increase educational aspirations for the anticipated student population.

Our vision is centered on empowering leaders with choice. We believe that all children should graduate from our school with the opportunity to say yes or no to college. Furthermore, for students where college isn't the appropriate next step, we want them to have employment and career options to sustain themselves and others. The following components of our school design align to our commitment to college and career readiness:

- Vision centered on empowering students as leaders which entails college access;
- DreamHouse Matrix drives rigorous academics and alignment to college; 21st century skills which are critical to employment; authentic leadership development; community engagement;
- Curriculum and standards are vertically aligned; part of later curriculum is a senior project and transition plan which links to post-secondary opportunity;
- Four years of required world language is aligned to top universities and colleges;
- DreamHouse Block will scaffold into high school years featuring engagement opportunities with higher education, employers, mentors, community leaders, and other post-secondary networks and opportunities;

Regarding Extracurricular partnerships, we recognize that at each level, 6th through 12th grade, there is need to align and prepare students for post-secondary opportunities; this is one of the reasons why we focus on 21st century skill development and leadership competencies at such an early age - we believe that forward-thinking and consideration for the future can be embedded into each level of learning. We will look to engage the following community partners, including, but not limited to: University of Hawai'i West O'ahu (UHWO), Running Start, GEAR UP Hawai'i, Early College High School Program, YMCA College Camp, UH Outreach College, College Horizons, Ching Consulting

Research surrounding the selection of these programs is based in the geographic location, current partnerships, and strategic alignment of these programs to our population.

4. A clear description, provided as **Attachment E (1 page limit)**, of a typical school day from the perspective of a student in a grade that will be served in the proposed school's first year of operation that aligns with the proposed school's vision and plan for school culture.

A description of a student's typical school day is provided as **Attachment E**.

5. Student Discipline.

- a. A clear description of the proposed school's philosophy on cultivating positive student behavior and a student discipline policy that provides for appropriate, effective strategies to support a safe, orderly school climate and fulfillment of academic goals, promoting a strong school culture while respecting student rights.
- b. Legally sound policies for student discipline, suspension, dismissal, and crisis removal, including the proposed school's code of conduct and procedural due process for all students, including students afforded additional due process measures under IDEA.
- c. Appropriate plan for including teachers, students, and parents or guardians in the development and/or modification of the proposed school's policies for discipline, suspension, dismissal, and crisis removal.
- d. Legally sound list and definitions of offenses for which students in the school must (where non-discretionary) or may (where discretionary) be suspended or dismissed.

Philosophy: a culture of clear, high expectations for all students, supported by strong school leadership, classroom and positive behavior management, modeling, and grounded in effective understanding of identity and partnerships with families and community will cultivate positive student behavior and support a safe, orderly school climate aligned to academic goals, identity

and leadership development, and respect for each other. Stakeholders will collectively set climate goals to maintain this culture and environment aligned to Hawai'i BOE Policy 101.7.

Policy: our policy for high expectations and accountability is grounded in our vision for identity and leadership growth, as well as our philosophy of intersectionality between expectations, adult modeling and support, and family engagement. It follows a similar pedagogy as our RTI model in that a) we want to give ample opportunity for corrective action and strategic response versus punitive and reactionary measures, and b) we want put many layers of structure and support in between identification (in this case, breach of culture) and separation measures (i.e. suspension or dismissal). The following offers a procedural narrative to our philosophy and policy:

(1) *Pre-enrollment Clarity* - our expectations and accountability philosophy and policy will be clearly listed, stated, and represented to families considering DreamHouse.

(2) *ILD* - students, parents, and school staff (teachers, support) will engage in conversations around the expectations and accountability that develop and support our school culture, safety, and identity;

(3) *Breach of Culture* - if a student breaches the culture and expectations of the school, it will be clearly identified and named up front; the student, and depending on the severity the parents/family and potentially other staff (depending on sensitivity) will be notified. Clear documentation and assessment of circumstances will be logged (aligned with Hawai'i Administrative Rules Title 8 - DOE, Education, Public Schools, Chapter 18).

(4) *Restorative Approach* - grounded in Marshall Ganz's Public Narrative framework around "challenge-choice-outcome", as well as the restorative justice program at Ralph J. Bunche High School in Oakland, CA, we will give students the opportunity to reflect and narrate corrective action and culture-supporting behavior; through open dialogue, individual reflection, and learning opportunities, we believe giving children the opportunity to take corrective action and resolve breaches (depending on severity) allows for strong development aligned to identity and leadership.

(5) *Accountability* - this step would come after the restorative action if either a) a student's breach of culture or action results in an accountability measure which could include an identified response, or b) the restorative approach was not opted by the student / the student did not choose to narrate the corrective, culture-supporting action.

(6) *Separation* - lastly, separation from school - in the form of suspension, dismissal, and crisis removal - would be the last action (unless of course it is legally warranted given its severity or alignment with Chapter 18). We do not support immediate punitive or reactionary behavior management, which is why a culture of clear expectations, strong modeling and support from adults, restorative and corrective action opportunities, and lastly measures to hold students accountable for breaches or actions come before this separation stage.

Code of Conduct - Based off our philosophy and general policy around holding high expectations and holding accountable those involved with breaches of culture, we envision the following code of conduct aligned to our DreamHouse Matrix, among other important cultural considerations. We will continue to develop this Code as a Leadership Support Team during the spring of 2017. The Code:

Academics - I am taking full advantage of educational opportunity that exists in front of me;

Skills - I treat others with dignity, respect, and am genuine and supportive in my actions;

Leadership / Character - My actions are aligned to my values and a strong moral code;
Identity / Community - I represent myself and my community with honor and pride;

Procedural due process for all students is aligned to the protocol listed in Part A with regard to our policy grounded in expectations, opportunity for corrective action, accountability response, and potential separation or legal response.

Aligned to the Individuals with Disabilities Education Act (IDEA) and the Free and Appropriate Public Education (FAPE) act, we will support and honor the individual needs and circumstances of each child, maintaining our vision for a safe, productive learning environment, and engaging community, Complex, and state partners as necessary. We will design educational experiences that engage students in their least restrictive environment (IDEA, Sec. 613), may require additional data to support corrective action and response if necessary, and may include specific supports and protocols in students' IEPs (to be determined on a case-by-case basis).

Development and Modification - Our applicant governing board, comprised of educators, parents of children in 'Ewa Beach public schools, and community members has developed the working draft that exists. Phase I is development of this draft; phase II is modification. The following is a our projected flow of development and modification:

Development (spring/summer 2016)

1. Applicant group develops working student expectations and accountability plan;
2. Students and parents offer additional insight and suggestions for policies;
3. Board members and partners with legal expertise check plan for legal alignment;

Modification

1. During planning year, founding school team will engage in potential modification and realignment; additionally, during initial PD days before school start, teachers will have the opportunity to engage with and modify as necessary and appropriate;
2. Beginning of year meetings with teachers, families, and students will also allow for investment and language modification as necessary and appropriate;
3. We will review data aligned with BOE and DOE required reporting (Class offenses) as well as overall effectiveness of policies on a quarterly and end-of-year basis, opening the process to student, parent, teacher, and stakeholder feedback;
4. School Board and Community Council will be engaged on a to-be-determined basis around the effectiveness and modification of student expectations and accountability plan / policies.

Overall, this is a working plan that will support a safe, productive, supportive culture at DreamHouse. It is never finished and we will adapt and change plans as necessary based on feedback, analysis, and reflection.

List and Definition of Offenses - Aligned to BOE and DOE policy (primarily Hawai'i Administrative Rules Title 8, DOE, Education, Public Schools, Chapter 18), we will follow our internal policies to the best of our abilities until, and on a case-by-case basis, student actions are deemed worthy of systematic and legally obligated response including, but not limited to, suspension or dismissal. Please refer to Chapter 18 for a full list of definitions of offenses; we will

adhere to the obligations set forth in this chapter for mandatory, non-discretionary suspension or dismissal, and only in unique circumstances, and after all stages of the expectation and accountability protocol have been exercised, would we consider discretionary suspension or dismissal, which would have to be the optimal choice of action to support the individual student, our student body, and a safe, welcoming, and supporting school culture and community.

E. Professional Culture and Staffing

1. Professional Culture

- a.** A sound plan for the creation, implementation, and maintenance of a professional culture and clear explanation of how the professional culture will contribute to staff retention, how faculty and staff will be involved in school level decisions and in developing new initiatives, and how success will be assessed. Professional development and evaluation is covered in [Criteria II.E.2](#) and should not be discussed here.

Vision: a professional culture grounded in our academic values and core beliefs; a culture of learners with growth mindsets, promoting a safe, welcoming, and supportive environment.

Key Members: the Leadership Support Team will be central to the planning and execution of team protocols and professional development; teachers will be involved in transparent, receptive planning and improvement cycle. The team will leverage best practices from local schools and organizations (e.g. Ewa Makai, SEEQS, Punahou, Kamehameha Schools, Iolani) to build a strong school culture.

Success at DreamHouse will start with our students: their personal and academic growth and achievement is paramount. Beyond our students, our families and our community must be welcomed to and supported by our school, which will be determined through feedback, interaction, and climate surveys. Lastly, and very importantly, our teachers; our teachers interface with multiple stakeholders under pressure and must feel supported, feel that they are developing in their craft and as professionals, and see growth ahead of them. Through a series of feedback protocols, climate surveys, open discussions, and brainstorming sessions, we will encourage teachers to surface issues they may see and empower them to make real change within our school community.

Professional Culture / DreamHouse Matrix

Academics: Adult growth, learning, content mastery amidst a supportive culture of colleagues

Creation - Design scope and sequence for Wednesday Huddle and Dream Block co-planning responsibilities; establish PD calendar and options for additional growth; co-establish teaching and learning goals; norm on reflective, growth-oriented practice;

Implementation - Summer planning (Leadership Support Team) and fall PD roll-out; curriculum and supporting materials / structures available to teachers over the summer (optional; support sessions available); initial 4 PD days immersive in curriculum, classroom and instructional design, collaboratively planning rhythm and objectives of the first two weeks;

Maintenance - Support team-oriented decision-making and rhythm (Wednesday Huddles) for academic decisions; allow teachers to deviate from curriculum as necessary (empower); encourage staff-driven data reflection and strategy; offer real-time feedback and support for

teachers designing learning experiences; support intrapreneurial culture and highlight successes, scale them; nurture safe, open classrooms where colleagues co-teach, learn from, offer feedback to, and partner around lessons and learning; encourage and model transparency; whole team check-ins around measures of success and strategic changes

21st Century Skills: Inter- and intrapersonal skills creating a collaborative team environment

Creation - Highlight vision for culture within interviewing and hiring process, clarify skills and adults behaviors that will add to a positive, supportive culture; establish personality baselines with Myers-Briggs, StrengthsFinder, Emotional Intelligence and other assessments;

Implementation - Summer planning (Leadership Support Team) and fall PD session protocols and design to build these skills among adults, support development of plans to include skill development in class, and build culture through collaboration; listing and being explicit about what these skills look like in action, why they are important;

Maintenance - Model norms (staff interaction, support, and collegiality); design staff learning experiences (Wednesday Huddles, PD days, prep blocks, open block) that build skill around creating, collaborating, communicating, and critical thinking); model open door, collegial environment at support team level; open climate surveys and feedback cycles to maintain democratic, teacher-drive culture of agency and decision-making;

Leadership & Character: Opportunity to take ownership and lead initiatives, professional development, and culture-building; develop leadership alongside of others

Creation - Establishing clarity around vision, values, core beliefs via interviews, summer onboarding, and initial PD days; collaboratively establish measures of success and vision of excellence (VOE) for school culture of intrapreneurial leadership and development; staff co-set self goals for leadership, voice, character;

Implementation - Co-design with staff core values and norms for school, leadership competencies and opportunities, external PD we will look to bring in; beginning of year PD days featuring roll-out of our staff model (working with Instructional Coach, prepping for Wednesday Huddle, prepping for Dream Block); plus-delta and real-time feedback of roll out;

Maintenance - Ensure flat leadership structure to increase voices, contribution, and agency in decision-making; design calendar for Wednesday Huddle leadership, open block conversations and development, Dream Block planning, and PD day leadership (leverage leadership within staff and give opportunities to learn by doing, feedback); staff reflect on and check in with Leadership Support Team around growth in leadership development areas; co-analyze climate survey; provide open door for development conversations, check ins, reflection, and feedback; encourage growth mindset competencies throughout difficult conversations and times;

Identity & Community: Individual identity is welcomed into the community and given opportunity to flourish; community is seen as an integral part of school culture

Creation - Listening and starting our year with “self”; looking in the mirror, unpacking, and establishing authentic self within DreamHouse; engagement with and listening to the local community (‘Ewa / ‘Ewa Beach)

Implementation - Build in self-reflection to feedback cycles, coaching conversations, and structured conversations; maintain Wednesday Huddle safe space to express self and lean on colleagues; encourage staff Dream Block planning aligned individual strengths across DreamHouse Matrix areas;

Maintenance - Climate surveys with open questions about self, identity safety, being welcomed, etc.; open door policy to check in, raise issues, offer feedback; collaboratively engage in climate data (staff and student data); allow for staff to lead initiatives that speak to their passions / hobbies, expressing self and leadership at school; provide opportunities to engage with community members, organizations; engage community into school site and workings, interactions with teachers; foster additional relationships and support networks outside of school, within community

- b.** If a high proportion of economically disadvantaged students is a part of the anticipated student population, a clear description of how the proposed school will address the anticipated academic challenges posed by the lack of socioeconomic diversity and the concentration of poverty among its students.

The Ewa Beach demographic is rapidly changing due to development and the diversity of incoming families. We anticipate around 1/2 of our students qualifying for Free and Reduced Lunch (FRL), which one could make the argument that 1/2 FRL and 1/2 non-FRL is relatively diverse. However, we will ground our approach in addressing academic challenges arising from a concentration of poverty among this population in our vision, mission, and DreamHouse Matrix. We believe that affirming our children for who they are, empowering them to be leaders, and developing a comprehensive culture of high expectations and support will engage our children in their own self-actualization and success.

- c.** A clear description, provided as **Attachment F (1 page limit)**, of a typical school day from the perspective of a teacher in a grade that will be served in the proposed school's first year of operation that aligns with the proposed school's vision and plan for professional culture.

A description of a teacher's typical school day is provided as **Attachment F**.

2. Professional Development

- a.** A clear description of the appropriate goals and data-driven strategy of the proposed school for ongoing professional development, including whole staff development, grade/level/course teams, and instructional coaching. The description must explain how professional development topics will be identified and how the professional development plan will be driven by data to improve teaching and learning as well as school performance. The description must also include the process for evaluating the efficacy of the professional development.

The Professional Development (PD) structures identified in this section apply primarily to start-up and Year One; founding teachers and Leadership Support Team will adjust professional development structures as necessary.

Headline DreamHouse Professional Development goals are that teachers respond via survey and other feedback and reflection metrics:

"Professional development has made a positive impact on my teaching and classroom"

"Student achievement increased as a result of professional development"

"I feel empowered in giving or participating in PD; I have a voice; I am a co-leader"

Professional Development Buckets for Year One:

- *Whole school* - 6 total days a year (per CBA) will be teacher days that will be focused mainly on professional development (PD) for staff (e.g. data analysis, RTI calibration, Dream Block scope and sequencing); primarily staff-designed and led;
- *Wednesday Huddles* - for the 2017-18 year will be grade team (6th grade only), and will focus primarily on data snapshots, RTI calibration, current themes or trends, and weekly collaborative planning time. Different teachers each week supported by Leadership Support Team members will lead huddles;
- *Instructional Coaching* - Instructional Coach will be available daily to co-prep / investigate with teachers;
- *Dream Block prep and co-facilitation / leadership* - on a rotating basis, and usually about once every six weeks, teachers and Leadership Support Team will design and facilitate Dream Block.

Topic Identification:

The overall arc of the year for PD for the 2017-18 school year will focus on a) establishing systems and a consistent culture across the school, b) strengthening school culture while developing teacher leaders, and c) empowering adults to build the identity and trajectory of school. This will happen from summer 2017 through summer 2018 in collaborative phases.

- *Summer 2017* - Leadership team generates PD focus areas and potential topics along arc of PD; School Board weighs in on approach, approves;
- *Fall 2017* - initial PD protocols and programming implemented during first four PD days of the year; PD arc general areas suggested and teachers see calendar options and buckets; teachers weigh in and help shape initial fall programming aligned to arc and buckets and offer feedback on initial PD;
- *Winter 2017/18* - Continue co-developing PD, programming, and feedback cycle while assessing progress in our “establishing systems and a consistent culture across the school” focus area; move focus of programming to “strengthening school culture while developing as teacher leaders”; cycles continue;
- *Spring 2017/18* - continue cycles, move from “strengthening school culture while developing as teacher leaders” to “empowering adults to build identity and trajectory of school” and offer final assessment, feedback space for end of year;
- *Summer 2017/18* - Leadership Support Team assesses effectiveness on three arc areas, goals, buckets, and overall PD programming and drafts 2018-19 arc with appropriate changes;

Data informing PD will come in the form of a) staff surveys, b) one:one conversations, c) reflections and self-identification of priority areas, d) student surveys, and e) student achievement data.

Evaluation of PD effectiveness will come from similar streams as our data so that we can align programming, data, and evaluation. To begin our evaluation cycle, we will consider the following three streams of evaluation: staff surveys, student data, and self-reflection (all staff).

These evaluations will be rolled up and offered to our School Board in the case they have additional thoughts or feedback as it pertains to staff culture, staff development, and student achievement.

Scheduled into the week is 240 minutes of sacred prep time, but also an 80 minute “leadership development” block each week during which time teachers do not have class; during this time they are expected to take self-directed leadership opportunities such as a) planning for a PD day, Wednesday Huddle, or Dream Block, b) thought-partnering with Instructional Coach or Special Ed Lead, c) observing / supporting another classroom, or d) taking initiative in some other way.

Sample Teacher Week & PD Rhythm for the Year

	Monday	Tuesday	Wednesday	Thursday	Friday
Teaching Time	3 80-min blocks	3 80-min blocks	3 80-min blocks	3 80-min blocks	4 80-min blocks
Prep Periods	Each day, 80-min block to prep, investigate, plan (240 mins total)			N/A	N/A
Leadership Development Block	N/A	N/A	N/A	80-min block (co-plan Dream Block; Instructional Coach support)	N/A
Dream Block	40-min (support)	40-min (support)	N/A	40-min (support)	40-min (lead)
Wednesday Huddle	N/A	N/A	Co-lead on data analysis	N/A	N/A

	Q1	Q2	Q3	Q4
PD Days	4 days	N/A	1 day	1 day
Wednesday Huddles	9 (co-prep / facilitate 1-2)	10 (co-prep / facilitate 1-2)	10 (co-prep / facilitate 1-2)	10 (co-prep / facilitate 1-2)
Dream Blocks	34	36	38	35
Dream Block Planning & Lead Facilitate	every 6-10 Dream Blocks; 3-6 total facilitations	every 6-10 Dream Blocks; 4-7 total facilitations	every 6-10 Dream Blocks; 4-7 total facilitations	every 6-10 Dream Blocks; 3-6 total facilitations
Instructional Coaching Opportunities	240 mins / week * 9 weeks	240 mins / week * 10 weeks	240 mins / week * 10 weeks	240 mins / week * 9 weeks
Leadership	80 mins / week *			

Development Non-teaching Time	9 weeks	10 weeks	10 weeks	9 weeks
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Leadership Support Team will play a more hands-on, active role during the beginning weeks and months of the school year, helping new teachers catch their stride and begin to settle into the DreamHouse culture. Instructional Coach will make direct outreach in scheduling sessions; Special Education Lead will help co-prep and differentiate lessons and classroom delivery; Operations Manager will carve out as much “non-instructional” work as possible from teachers; and School Director will oversee coordination of moving pieces.

b. A description of professional development opportunities, leadership, and scheduling that effectively support the Academic Plan and are likely to maximize success in improving student achievement, including an adequate induction program. The description must explain what will be covered during the induction period and how teachers will be prepared to deliver any unique or particularly challenging aspects of the curriculum and instructional framework and methods.

Initial Induction Program:

Led by the Leadership Support Team, these are the new teacher induction layers:

1. *PRE* - Optional (but strongly encouraged) summer reading, self-assessment, and curriculum planning guidelines;
2. *FIRST FOUR* - first four PD days will be mainly spent covering the following areas:
 - a. Vision, mission, beliefs, and values of the school’s charter
 - b. One school - how to collaboratively build the DreamHouse identity and culture
 - c. Our community - connection with and immersion in our local community
 - d. Our students - snapshot of lottery, admitted students, anticipated supports
 - e. RTI model - discuss referral and identifying protocol, tiering, and overall theory
 - f. Calendar - month to month view of days, daily schedule, PD days, Wednesday Huddles
 - g. Curriculum – open CRDG planning with support from UH colleagues
 - h. Dream Blocking - break down Dream Block and collaboratively set initial arc for the year, co-planning schedule for the first month, norm on rhythm of time, outcomes, alignment to DreamHouse Matrix
 - i. Operations and logistics - the running of the school
 - j. Our structure - our school staff roles and responsibilities, our board, our Nonprofit, Community Council, and other stakeholders; engage board(s) in this section
 - k. Educator Effectiveness System training
 - l. Open collaboration and planning time
3. *FIRST MONTH* - check-ins with individual teachers, weekly surveys, feedback cycles, and space for conversation to continue induction of new teachers and creation of our school identity and culture.

Please refer to Part A for additional detail for how our calendar structure, prep and leadership development time, staff structure, and teaching schedule support improving student achievement.

- c. A clear description of the expected number of days or hours for regular professional development throughout the school year that includes an explanation of how the proposed school’s calendar, daily schedule, and staffing structure accommodate this plan; the time scheduled for common planning or collaboration; and an explanation for how such time will typically be used. The description must identify ways the professional development scheduling conflicts with Master Collective Bargaining Agreements, explain any specific amendments that may be needed through supplemental agreements, and provide an adequate contingency plan in the event such amendments cannot be negotiated under supplemental agreements.

The calendar, daily schedule, and staffing structure is aligned to the professional development model and leadership opportunities we will offer our teachers. Beyond the aforementioned PD days and our Wednesday Staff Huddles, four out of five days per week teachers have 80-minute blocks to develop, a blend of prep and leadership development time. Please refer to Part A for more detail.

- d. A description identifying the person or position with the time, capacity, and responsibility for coordinating professional development and a reasonable plan for identifying ongoing professional development needs, including sufficient funds and resources (Title II funds, etc.) for implementing the professional development plan.

Lastly, our staffing model in 2017-18 features (1) an Instructional Coach whose core responsibility will be to partner with teachers to strengthen pedagogy and delivery; (2) a Special Education Lead who will support teachers in creating highly differentiated classrooms, supporting our students with special needs, and actively managing our RTI model; (3) an Operations Manager who will own operational, non-instructional tasks; and (4) a School Director whose role will be to thought-partner, offer feedback and evaluation, and ultimately support the development and effectiveness of our educators. Ultimately, the School Director will bear responsibility for the overall implementation and effectiveness of PD. However, we will leverage our 2017-18 Leadership Support Team in coordinating and identifying additional needs for PD.

3. Staff Structure

- a. A complete staffing chart for the proposed school, using the Staffing Chart Template ([Exhibit 2](#)) and provided as **Attachment G (required form)**, that clearly indicates all positions, is aligned with the Academic Plan, and proposes a salary structure that is in alignment with the proposed school’s budget.

A staffing chart is provided as **Attachment G**.

- b. A description of a reasonable rationale for the staffing plan, as demonstrated in the staffing chart, that clearly explains how the relationship between the proposed school’s leadership or management team and the rest of the staff will be managed and includes justifiable teacher-student and total adult-student ratios for the proposed school.

Our rationale for our staffing plan is two-fold:

1. A lean founding Leadership Support Team (4) that can handle academics, manage organizational and operational components, and support the design and execution of

highly differentiated classrooms while also managing IEPs and additional accommodations for a 100-student school in start-up mode;

2. A lean founding teaching team (5) for the first year covers all five of our 80-minute content blocks; teach three blocks a day four times a week, and teach four blocks one day a week, with adequate prep and collaboration time, and manageable class size (25).

The relationship between adults at the school site will be collegial and supportive in nature; we are avoiding the term “administration” and using “Leadership Support Team” so that our culture is built upon a model where the School Board supports leadership, leadership supports teachers, and teachers support students; one will not see a DreamHouse hierarchy with a principal on the top and students on the bottom - this is strategic and symbolic.

With a 100-student 6th grade cohort and four teachers holding class at any given time, average class size will be 25 students. Ilima and Ewa Makai have 22:1 and 20:1 student to teacher ratios, respectively; Campbell is at 21:1. With a model focused on highly differentiated, student-led learning and teacher-facilitated classrooms, we believe 25 students per classroom is optimal for learning and organizational viability.

- c. If the proposed school has a *virtual or blended learning program*, a clear description for the identification of the position(s) dedicated to IT support and a reasonable plan that clearly ensures sufficient capacity for deploying and managing technology inventory and network needs with minimal interruptions to teaching and learning, including troubleshooting support for school staff and students.

Not applicable because the proposed school does not contain an online learning program.

4. Staffing Plans, Hiring, Management, and Evaluation

- a. A clear description of the proposed school’s recruitment and hiring strategy, criteria, timeline, and procedures that are likely to result in a strong teaching staff that meet “Highly Qualified” requirements in accordance with the Elementary and Secondary Education Act (“ESEA”) and are well-suited to the proposed school, including other key selection criteria and any special considerations relevant to the proposed school’s design. The description must also explain strategies, including compensation packages, that are likely to attract and retain high-performing teachers.

Recruitment: we have identified five main streams of potential teachers to supplement our broader marketing and advertising strategy that will highlight our need and opportunities to apply (i.e. radio ad, TV spot, social media, career and education website linking, referrals, and canvassing): Existing Hawai‘i DOE teachers; University of Hawai‘i College of Education; Chaminade University Division of Education; Educational partnerships (i.e. Kūlia & Ka Lama by INPEACE); and Existing local educational networks.

We will set up an e-mail and web form where interested candidates can easily enter our recruitment pool and engage with DreamHouse through our website, informational videos, in-person informational sessions, and by direct contact.

Hiring: We will recruit and hire staff who possess the qualifications to work successfully within ‘Ewa Beach, deliver the education program effectively, and support and sustain the school’s

vision of affirming the identities of and empowering leadership within our students. To that end, we prioritize the recruitment, interviewing, and hiring of individuals whose identities, experiences, and backgrounds align with those of our students. To ensure selection of highly qualified staff, we implement the following protocol:

1. Wide, differentiated posting of employment opportunities;
2. Request of a resume, cover letter, and short essay responses;
3. Brief screening interview (in-person or by phone);
4. Sample teaching lesson followed by debrief with School Director and/or members of the Leadership Support Team;
5. Extensive in-person interview with members of the school's current staff (for 2017-18 this will mean Leadership Support Team and founding board members);
6. Verification of credential and previous employment, State and Federal background checks, and professional and personal reference checks;
7. After receiving recommendations from Leadership Support Team, founding board, and other advisors, School Director will make final hiring decision aligned to the vision, mission, academic beliefs, and core values of DreamHouse, while keeping in mind that a diverse, talented staff committed to Hawai'i will be crucial to the viability and trajectory of our school and children;

Criteria: as outlined in the Master Collective Bargaining Agreement and pertinent BOE policies, we will focus our recruitment efforts on candidates who have either a) come from the Hawai'i DOE system as current educators, b) have graduated from a State Approved Teacher Education Program (SATEP), or c) are transferring into the system from elsewhere, but possess content knowledge, multiple years of experience (2+, except for exceptional situations), and a deep commitment to Hawai'i and 'Ewa Beach as demonstrated by experience or identity alignment, values, and beliefs. Beyond the legal and Highly Qualified considerations, we are looking for candidates who strongly align to the DreamHouse Matrix.

Timeline: beginning fall 2016, we commence advertising for positions and open web portal to build recruitment pipeline and database. Full staff should be hired by summer 2017.

1. *Fall 2016* - Commission decision rendered; initiate hiring strategies: engaging partners and human capital streams, conduct outreach, advertising and posting, informational meetings and workshops, canvassing, and overall recruitment;
2. *Early Spring 2017* - February / March 2017 begin building out diverse candidate pool for five identified teaching positions (please note: Leadership Support Team will have been hired / appointed already as a result of School Director and founding board building team); create pool and initiate aforementioned hiring protocol over March, April, and May;
3. *Late Spring 2017* - final candidates, offers, and sign-on founding teacher team;
4. *Summer 2017* - informational onboarding, encouraged summer preparation;
5. *August 2017* - begin with initial PD days at DreamHouse.

Procedures: our procedural norms will be as follows - Begin with Leadership Support Team norms; Borrow local practices from Complex schools and local charters; Engage founding board; interview by committee; Hiring autonomy for School Director.

Additional Special Considerations & Strategies: diversity of staff in reflection of the community, a deep love for all children, flexibility in start-up mode, and fit with culture and values.

- b. If the proposed school offers a *virtual or blended learning program*, a clear description of the proposed school's recruitment and hiring strategy, criteria, timeline, and procedures that are likely to result in strong online learning teachers that have the requisite subject-matter knowledge, technological proficiency, communication skills, and other capabilities necessary to teach effectively in the online learning environment.

Not applicable because the proposed school does not contain an online learning program.

- c. A clear description of realistic and legally sound procedures for hiring and dismissing school personnel, including procedures for conducting criminal history record checks.

Hiring:

- DreamHouse will follow the hiring guidelines as set forth by DOE OHR 600-001 and -003 background check and fingerprinting protocols as well as Hawai'i BOE Chapter 7 pertaining to criminal history record, employment history, and background checks; FBI fingerprint information forms, government issued ID, and a social security card (or Passport) must also be obtained and produced to the DOE OHR Employee Background Check division. Prior to employment, each employee must furnish an up-to-date Mantoux Tuberculosis (TB) test result, and documents establishing legal employment status.
- New employees not possessing a valid Hawai'i Teaching Credential must submit two sets of fingerprints to the Hawai'i Department of Justice for the purpose of obtaining a criminal record summary. The School Director and Operations Manager shall monitor compliance with this policy and report to DreamHouse School Board. The DreamHouse School Board Chair shall monitor the fingerprinting and background clearance of the School Director.
- Volunteers outside of the direct supervision of a credentialed employee shall be fingerprinted and receive background clearance prior to volunteering without the direct supervision of a credentialed employee.
- Employees who are legally suitable and cleared to work in public schools will sign an at-will contract with DreamHouse stating their intention to work at and support a safe, welcoming, and positive culture aligned with the vision and values of DreamHouse.
- DreamHouse will not discriminate against any employee on the basis of race, religious belief, color, sex, pregnancy, sexual orientation, age, national origin, ancestry, physical or mental disability, medical condition, marital status, or any other protected classification, in accordance with applicable law.

Dismissal: the following are dismissal policies and procedures applicable to all DreamHouse employees:

- **Legal** - Per BOE and Hawai'i Administrative policy, if staff are found in violation with legal expectations governing our school and public program, they will face legal ramifications and dismissal will be considered depending on the nature of the offense.

- **Professional Expectations** - A clear set of performance metrics and standards will be developed during the planning year and given to teachers and staff at the beginning of their time at DreamHouse, aligned to the Educator Effectiveness System (EES). If at any time a staff member is observed to be failing to meet these expectations, the School Director will intervene. If the School Director deems this to be recurring, a support plan will be co-developed with performance metrics (i.e. student achievement, observation feedback, peer feedback, reflection, and additional EES components). If little or no progress is made over the course of the plan (timeline negotiable and to be determined), then staff member could face additional action including, but not limited to, dismissal.
 - **Culture** - A positive, safe, welcoming environment for all students and staff is to be promoted and nurtured at all times. If a staff member is found to be in violation of or commits a breach of culture, then that staff member may face temporary separation, a support plan, or permanent dismissal. Culture breaches will be dealt with on a case-by-case basis with support and insight from the School Board.
 - **Unique** - In unique circumstances where the at-will contract is violated in any way, the School Board will be consulted to offer insight and perspective into staffing decisions protecting the rights of each staff member and maintaining the integrity of a safe, positive, supportive, welcoming school environment.
 - **Procedure** - In the case that a staff member is found to be a) not meeting professional expectations, b) in violation of the culture of DreamHouse, or c) in violation of the at-will contract in any way, a series of steps will be implemented to maintain staff rights and school environment:
 1. School Director or Leadership Support Team member(s) consults individually with staff member to gather facts, insight, and background information;
 2. School Director or Leadership Support Team member(s) investigates situations to determine contributing factors, circumstances, and any pertinent evidence;
 3. Depending on the severity, legality, or egregiousness of the offense in question, School Director or Leadership Support Team member(s) may a) confer with additional staff members, b) confer with School Board to gain additional insight, c) engage HSTA as another opinion in the matter, d) co-develop and implement a support and development plan for staff member, or e) proceed to immediate dismissal of staff member. In the case of dismissal, a teacher would still have a right to grievance and may engage HSTA on their behalf.
 4. In the case of a support plan, monitoring and feedback from teacher as to effectiveness of plan will be sought; in the case of dismissal, exit survey will be offered.
- d.** A thoughtful plan for supporting, developing, and annually evaluating school leadership and teachers that is likely to produce and retain a successful staff, including a description of the processes, protocols, framework, criteria, and/or tools that will be used for conducting evaluations, delivering feedback, and coaching. The plan must cite any evidence or existing research supporting the effectiveness of utilizing the specified approach. If already developed, the plan should provide any leadership evaluation tool(s) as **Attachment H (no page limit)** and any teacher evaluation tool(s) as **Attachment I (no page limit)** that are likely to be effective. Evaluation tools must align with the criteria outlined in BOE Policy 2055 and related provisions of any Master Collective Bargaining Agreements, unless specific amendments are executed in a supplemental agreement. If amendments will be needed, the

plan must describe the specific amendments that would be necessary to implement the evaluation tool(s), demonstrate an understanding of the employment environment, and include a reasonable plan for contingencies if the amendments cannot be negotiated under a supplemental agreement.

Evaluation: For 2017-18, Leadership Support Team members will receive individual feedback aligned to a) their job description, b) teacher and student surveys, and c) student data, among additional factors, on a quarterly basis from School Director. Specific leadership evaluation protocols and frameworks are being considered from a range of local and mainland school and will be selected by spring 2017.

DreamHouse will align teacher evaluation to the Hawai'i DOE's Educator Effectiveness System (EES) for the 2017-18 school year and make appropriate, contextual changes as needed moving forward. Please refer to **Attachment I** to see the 2015-16 EES model. Responsible for EES training and implementation will be the Instructional Coach and the School Director; both will collaborate in 2017-18 to assess effectiveness of all five teachers, while making appropriate changes for our approach to 2018-19.

Lastly, teachers and the Leadership Support Team will have an opportunity to evaluate the School Director on a basis of job description, school climate, support, and academic results, among other data points. Specific protocols, frameworks, and criteria will be developed in the spring of 2017 alongside founding Leadership Support Team, supported by the WestEd 2011 report highlighting multiple states' principal evaluation systems, referred to in **Attachment H**.

- e. An effective plan that explains how the proposed school intends to promote or incentivize satisfactory and exceptional school director, management team, and teacher performance and handle unsatisfactory school director, management team, or teacher performance, including effective planning for turnover.

Promotion: Promotion of DreamHouse employees will be based on a growth-oriented need for the school. As we are beginning with a lean staff of nine, and seeing as we are going to be one grade with 100 students, promotion in terms of responsibility will come with a) intrapreneurial initiative (i.e. designing and leading programming), b) growth in our school team and increased coaching and support of new and existing teachers (i.e. teacher leadership model), and c) expansion to a high school and the need for additional leadership and design staff supporting the new grades and evolving model.

Incentivize: During the 2017-18 year, pay and benefits will be directly aligned to the Master CBA, so no deviation or increase will materialize in the form of additional compensation.

Unsatisfactory: Unsatisfactory performance will follow a similar structure as detailed in the aforementioned dismissal section for teachers and Leadership Support Team. For the School Director, metrics as set forth by the governing board (to be determined, but aligned with teacher survey metrics, school climate metrics, student achievement and growth, external stakeholder feedback, and other data points) will guide effectiveness and evaluation.

Effective Planning for Turnover: Building a strong bench of teachers, Leadership Support Team members, School Director, and board members is essential to the effectiveness and growth of our school.

- Keep recruiting pipeline open at all times, building deep pool of potential hires even after we are staffed for the 2017-18 school year;
- Engage Leadership Support Team, School Director, and board members to come up with personal bench (i.e. “if you could no longer serve in your role, which three people could serve in the position?”);
- Keep a pulse on current team members via climate and staff surveys and ongoing conversations;
- Empower teachers and team members to take on additional responsibilities and perspectives so in the case of turnover, others (internally) are ready to step up and take on responsibility, role, and work streams.

f. A satisfactory explanation of any deviations in staffing plans, including salaries, from Master Collective Bargaining Agreements, including identification of amendments that would be needed in a supplemental agreement and a reasonable plan for contingencies if such amendments cannot be negotiated under a supplemental agreement.

Our staffing plans and salaries do not deviate from the Master Collective Bargaining Agreements.

g. If developed, reasonable and legally sound personnel policies or an employee manual, provided as **Attachment J (no page limit)**.

Not applicable because personnel policies or an employee manual is not yet developed.

F. School Calendar and Schedule

1. A school calendar for the proposed school’s first year of operation, including total number of days and hours of instruction, provided as **Attachment K (no page limit)**, and a satisfactory explanation of how the calendar aligns with and clearly reflects the needs of the Academic Plan.

Our calendar is aligned to the BOE calendar and falls within CBA guidelines and agreements for the school year; Our daily schedule is within HSTA and BOE require minutes and regulations; Our daily calendar offers 80-minute block classes aligned with our curriculum requirements in the 6th grade and beyond; there are short, but adequate breaks throughout the 8AM-3PM school day in order to maximize learning time; A morning huddle and daily close sets academic intentionality for the day; Dream Block and HSTA CBA - while Dream Block time is considered “Instructional Time” from a BOE standpoint, the minutes are not HSTA-coded instructional minutes; instead, they come from the 440 minutes per week available for scheduled activities (p. 27, HSTA 2013-17 CBA). The minutes fall into Student Learning Time, as determined by Act 167, but not Teacher Instructional Time (see 2014 legislative report titled 302A-251 concerning School Year and Instructional Time). Please refer to **Attachment K** for a school calendar for the first year of operation.

The Dream Block. Every day but Wednesday, students, teachers, and Leadership Support will engage for a 40-minute development block at the end of the day before the 2:50PM whole-school close. The development will focus on components of the DreamHouse Matrix and will allow students a chance to exercise learning and leadership outside of the standards-driven classroom setting. The purpose of the block is to zoom out of the classroom, mix student groups,

develop teacher leadership, build community and culture, and engage community members. Examples for Dream Blocks are as follows:

- *Rigorous Academics* - students are broken into groups of five and given three community-based math problems they must solve; teachers support groups;
- *21st Century Skills* - students groups act out a scene from a play from English class; student groups perform to larger audience;
- *Leadership* - students engage with ILDP (*Infinite Classroom*) to assess growth across classes, identify gaps in learning, and devise three new habits for improvement;
- *Identity* - each student designs their “dream community” with layers of culture, policy, and values; students pair share and hang dream communities in hallway.

The arc / scope and sequence of the Dream Block schedule and norms will be designed with Leadership Support Team members during the spring of 2017 and updated with founding teachers.

2. A clear description of the structure of the proposed school’s day and week that aligns with and clearly reflects the needs of the Academic Plan, including the following:

- a. A description of the length and schedule of the school week.
 - b. A description of the length and schedule of the school day including start and dismissal times.
 - c. The minimum number of hours or minutes per day and week that the proposed school will devote to academic instruction in each grade.
 - d. The number of instructional hours or minutes in a day for core subjects.
 - e. A satisfactory explanation of why the proposed school’s daily and weekly schedule will be optimal for student learning.
 - f. The number of hours or minutes in a day for teacher planning time.
 - g. A sample daily and weekly schedule for each division of the proposed school, provided as **Attachment L (no page limit)**.
- *A description of the length and schedule of the school week:* Each day students have four out of five courses in the form of 80 minute blocks; Students begin each day with a brief huddle (advisory); M, T, Th, F features a 40 minute Dream Block and a 10 minute close; Two five minute transitions throughout the day, as well as a 30 minute lunch.
 - *A description of the length and schedule of school day with start and dismissal times:* Week and teacher day runs from Monday to Friday, 8AM - 3PM every day; Student school day begins at 8AM and ends at 3PM M, T, Th, F; W is a staff huddle day and students are released at 2:10PM.
 - *The minimum number of hours or minutes per day and week that the proposed school will devote to academic instruction in each grade:* 320 minutes of academic instruction / day (1,600 min / week); 50 minutes (avg.) of programmed academic time per day (open, close, Dream Block); $320 + 50 = 370$ minutes * 182 days = 67,340 minutes (1,122 hours).
 - *The number of instructional hours or minutes in a day for core subjects:* Core subjects for 6-8 grades - 6th: ELA, Math, Science, Social Studies, Hawaiian Studies / 7th: ELA, Math, Science, Social Studies, World Language, Theatre / 8th: ELA, Math, Science, Social Studies, World Language, Theatre; Minutes / day = 320; hours / week = 1,600.

- *A satisfactory explanation of why the proposed school’s daily and weekly schedule will be optimal for student learning:* We are focused on maximizing student learning time while also providing ample opportunity to develop skills and mindsets across student cohorts. The following was used when designing this schedule: A morning huddle and daily close sets academic intentionality for the day; 80-minute blocks will provide teachers an opportunity to dive deep into curriculum and material on a daily basis; Minimized passing time maximizes structure and learning time; A 30 minute lunch gives children ample time to breathe and stretch midday; 40-minute Dream Blocks M, T, Th, F allow for students and teachers to zoom out of the classroom, cross-pollinate student groups, encourage teacher leadership, build community and culture, and engage community members; A daily close on M, T, Th, F allows us to wrap the day as a school community.
- *The number of hours or minutes in a day for teacher planning time:* 2013-17 CBA demands 225 minutes / week - we have allocated 240 minutes. In addition, we have allocated 80 minutes / week for teacher-initiated leadership development and collaboration.
- A sample daily and weekly schedule for each division of the proposed school, provided as **Attachment L**.

G. Supplemental Programs

1. If applicable, a description of a sound plan for any summer school programs the proposed school will offer that will meet anticipated student needs, including a clear explanation for how the programs are integral to the proposed school’s academic plan, a reasonable schedule and length of the program, and sound funding plan for the programs. If the programs will not be implemented in the first year of operation, the plan must describe the timeline for implementation.

Not applicable because the proposed school does not currently have a plan to offer any summer school programs.

2. If applicable, well-designed plans and identified funding for any extracurricular or co-curricular activities or programs the proposed school will offer that will meet anticipated student needs and provide enrichment experiences that are in alignment with the Academic Plan. The plans must describe how the activities and programs are integral to the proposed school’s academic plan, how often they will occur, how they will meet anticipated student needs, and how they will be funded. If the activities or programs will not be implemented in the first year of operation, the plans must describe the timeline for implementation.

Not applicable because the proposed school does not currently have a plan to offer any extracurricular or co-curricular activities or programs.

H. Third-Party Service Providers

This section is not applicable. The proposed school does not plan to partner with a Service Provider.

I. Conversion Charter School Additional Academic Information

This section is not applicable. The proposed school is not a conversion charter school.

III. Organizational Plan

A. Governance

1. A clear description of the mission and vision of the proposed school governing board that is aligned with the proposed school’s mission and vision, if different from the proposed school’s mission and vision, and a clear and concise description of the governance philosophy that will guide the proposed school governing board, including proposed school governing board’s bylaws and any other governing policies (except the Code of Ethics and Conflict of Interest policy, which will be provided separately) that are comprehensive and sound, provided as **Attachment R (no page limit)**, and the completed and signed Statement of Assurances (Exhibit 3), provided as **Attachment S (required form)**.

Vision | The vision for the DreamHouse School Board is a school that empowers leaders, affirmed in their identity, and committed to their local community and the Hawaiian Islands.

Mission | The board’s mission is to support the school in the governance of high-level academic, organizational, and financial strategy to enable the school to operate a high quality, viable educational program as outlined in the academic plan.

Governance Philosophy | Governance within our model will mean providing the resources, thought-partnership, and strategic support to empower DreamHouse with adequate autonomy to operate our educational model, while also working diligently to help us hold ourselves accountable to the goals, metrics, and success indicators outlaid in our charter. Strategic counsel across academic, organizational, and financial pillars of our school model, from the perspective of a managing board, is essential to the effective delivery of our educational program, as well as the success of our students.

Please see **Attachment R** for DreamHouse governing School Board bylaws, and **Attachment S** for DreamHouse Statement of Assurances.

2. Organizational charts, provided as **Attachment T (no page limit)**, that clearly indicate all positions and illustrate the proposed school governance, management, and staffing structure in: a) Year 1; and b) all subsequent years until full capacity is reached. The organizational charts must clearly delineate the roles and responsibilities of (and lines of authority and reporting among) the proposed school governing board, staff, any related bodies (such as the proposed school’s supporting nonprofit organization, advisory bodies, or parent/teacher councils), and any external organizations that will play a role in managing the proposed school. The organization charts must also document clear lines of authority and reporting between the proposed school governing board and proposed school and within the proposed school.

Organizational charts are provided as **Attachment T**.

3. A description of an effective governance structure of the proposed school, including the primary roles of the proposed school governing board and how it will interact with the school director, any school management teams, any essential partners, and any advisory bodies.

The description must include the size, current and desired composition, powers, and duties of the proposed school governing board that will foster the proposed school's success; identify key skills or areas of diverse expertise that are or will be effectively represented on the proposed school governing board; and adequately explain how this governance structure and composition will help ensure that: a) the proposed school will be an academic and operational success; b) the proposed school governing board will effectively evaluate the success of the proposed school and school director; and c) there will be active and effective representation of key stakeholders, including parents or guardians.

The primary role of the proposed school governing board is to empower and hold accountable the School Leader and Leadership Support Team in the effective delivery of an educational program aligned to its charter alongside strong organizational and financial management.

The current applicant governing board is eight total members, and nine is the desired size for the founding school governing board including chair, vice chair, treasurer, clerk, School Director, and three additional board members. With regard to key skill areas, an equal blend of academic, financial, fundraising, legal, and human resource management experience will serve as the optimum composition; at no time will our board lack at least one person in each of these five areas. In addition, we have and will continue to prioritize board recruitment from the local 'Ewa Beach community, aligned to these experience areas. Lastly, we will have a minimum of one parent representative on the board at all times.

Each will have one vote (except School Director) and the management hierarchy will be (1) chair, (2) vice chair, (3) treasurer, (4) clerk; in the absence of any one of these members, the next in authority will serve as lead.

School Board-School Director Interaction - The School Director will sit on the school governing board as an ex-officio, non-voting member, serving as liaison to the school and communicating / implementing decisions made by the board within the school. The School Director will meet bi-weekly with the School Board chair to discuss pertinent topics including current academic progress, staffing, school climate, financials, etc.

School Board-Nonprofit Board Interaction - No board member may sit on the School Board and the nonprofit board simultaneously, except for the School Director, who will not have voting privileges on either board. Any communication between the School Board and Nonprofit board will flow primarily through the board chairs of respective boards while engaging the School Director, and the primary topic of conversation should pertain to the financial management of the school. The Nonprofit board's fundraising and fiscal duties will supplement and help inform the School Board's fiscal decisions; the nonprofit board does not have any authority over budgetary decisions relating to the operation of the school.

a) Academic and Operational Success - Our board will be comprised of individuals who possess key skills and diverse areas of expertise, and also are vision- and values-aligned with DreamHouse. Our School Director will open and support direct lines of frequent communication between the three groups to facilitate strong operation. Furthermore, clear lines of responsibility for our

School Board, Leadership Support Team, and our nonprofit board will enable each team focus on effective ownership of work streams.

b) School Director Evaluation - Clear goals and metrics of success have been set throughout the charter for academic, organizational, and financial areas. In the case that the school is not meeting the needs of students, adults, and/or is falling behind in any of the three aforementioned areas, the board will work collaboratively with the School Director to analyze root causes and potential solutions. Proactive and honest conversations between the School Director and the School Board chair will serve to highlight areas of ongoing concern and it will ultimately be left to the discretion of the board chair and School Board members as to whether or not the School Director is inhibiting or enabling growth and success at the school.

c) Active and Effective Representation of Key Stakeholders, Including Parents or Guardians - We will actively seek 'Ewa Beach community members to serve on the board, including at least one parent; it is important that we give voice, voting, and decision-making privileges to our parents and community members, in addition to the Community Council. Lastly, our board will have rotating terms in order to allow for new parents and community stakeholders to join as we grow and become more integrated within the community.

4. If the proposed school has a *virtual or blended learning program*, a clear description of the role the governing board will play in the online learning program that ensures the effective oversight of the online learning program, including a clear and realistic description of the requisite knowledge of online learning that the proposed governing board currently possesses or will endeavor to possess.

DreamHouse does not have a virtual or blended learning program.

5. Demonstrated will, capacity, and commitment of current and proposed governing board members to govern the proposed school effectively by providing the following:
 - a. A list of all current and identified proposed school governing board members and their intended roles;
 - b. A clear summary of members' qualifications for serving on the proposed school governing board, including an adequate explanation of how each member meets any of the considerations in HRS §302D-12 and will contribute a wide range of knowledge, skills, and commitment needed to oversee a *high-quality charter school*, including academic, financial, legal, and community experience and expertise;
 - c. Completed and signed Board Member Information Sheets (Exhibit 4) and resumes for each proposed governing board member, provided as **Attachment U (required form; no page limit)**, that demonstrates board members share a vision, purpose, and expectations for the proposed school; and
 - d. If not all board members have been identified, a comprehensive and sound plan and timeline for identifying and recruiting governing board members with the necessary skills and qualifications, including a description of such skills and qualifications.
 - e. If the current board will transition from an Applicant Governing Board to a more permanent governing board, a comprehensive and sound plan for such a transition,

including a reasonable timeline for recruiting and adding new members; a brief description of the individual and/or collective skills sets the anticipated board members are expected to bring, with specific reference to the skill sets described in HRS §302D-12; a description of the priorities for recruitment of additional or replacement proposed school governing board members and the kinds of orientation or training new members will receive; and identification of any bylaws, policies, or procedures changes that will be necessary for such a transition.

Current Applicant Governing Board

NAME	CURRENTLY	CAPACITY
Zach DiIonno*	Attorney	Legal
Meilan Akaka*	Leadership Coach	Human Resources
Jacob Karasik*	Wood Worker	Fundraising
Lisette Roman*	Community Theatre	Academic
Alex Teece	Graduate Student	Fundraising
Dr. Deborah Zuercher	UH COE Professor	Academic
Jane Henzerling	School Leader	Human Resources
Ed Kaukani	Retired Banker	Financial

**Current members of DreamHouse, Inc. Nonprofit; will be transitioned off board if affirmative Commission decision rendered.*

Non Non-profit Board Members who will roll onto Governing Board immediately:

QUALIFICATIONS
<p>Dr. Deborah Zuercher has worked to empower teachers to become agents of change that positively impact student achievement in their classrooms for over 28 years. She has served as a classroom teacher, assistant high school principal, middle level principal and university teacher educator for cohorts of new teachers on the Leeward Coast, including ‘Ewa Beach. Deborah is currently a tenured associate professor in the Master of Education in Teaching Program at the University of Hawai‘i at Mānoa and the Principal Investigator for the American Samoa Teacher Education Program. She teaches and advises cohorts of graduate teacher candidates enrolled in the College of Education in Hawai‘i, American Samoa, and across Micronesia. Dr. Deborah Zuercher’s research interest is applied qualitative action research, which describes the effects of facilitating instructional interventions that are contextualized within unique cultural learning environments. She teaches indigenous qualitative research methods, literacy, performing arts and health education courses. Deborah is a professional development consultant for in-service teachers with the American Samoa Department of Education, Guam Public Schools, Ohio Department of Education, Kamehameha Schools, Republic of Palau Ministry of Education, PREL PRCC, and the University of Hawai‘i at Mānoa.</p>

Ed Kaukani was born and raised in ‘Ewa Beach and graduated from James Campbell High School in 1980. He spent over 20 years of his career with First Hawaiian Bank, and brings to this project financial, sales, human resource, and personnel development, and organizational experience. Ed is passionate about his local community and has partnered extensively as part of the DreamHouse team since 2013 in identifying current educational need and opportunity within the community and working to craft the vision and trajectory of this proposed school.

Jane Henzerling is the founder and current head of school for Mission Preparatory School, a K-8 college preparatory charter school in a high-poverty area of San Francisco. Prior to founding and leading Mission Prep, she served as Executive Director for Teach For America-Miami, among other education, fundraising, and leadership development roles. She has served as a mentor and coach for Alex Teece (proposed School Director) since spring 2013 and possesses deep knowledge for this initiative.

Alex Teece is the proposed School Director for DreamHouse and has been working on this project since November 2012. A graduate of the University of Hawai‘i at Mānoa’s College of Education, Alex’s passion for public education in ‘Ewa Beach began when we served as an ELA teacher at Ilima Intermediate from 2008-2010, before being displaced by “Furlough Fridays.” His background is in education, finance, fundraising, and external affairs, while also having served as a team leader at Ilima, summer school director, and coach to multiple teachers as part of his current graduate work.

Our board consists of individuals who are born and raised in the Ewa Beach community, have extensive experience teaching and / or supporting teachers, or have been deeply involved with designing this project. Please see **Attachment U** for Board Member Information Sheets and resumes for board members.

Additional individuals being considered bring with them academic, financial, legal, and community experience and expertise via experience with the Hawai‘i State Public Charter School Commission, the Hawai‘i DOE central office, Hawai‘i public schools, school leadership, community leadership, and mobilizing.

Timeline and Plan:

- Summer 2016 - confirm additional five members who have been identified;
- Fall 2016 - upon decision rendering from Commission, confirm / onboard board members;
- Founding School Board will be nine total members with experience across academic management, financial management, fundraising, community relations, human resources, and school leadership.

As our school continues to grow from 2017-18 to the 2018-19 school year, we will seek additional board members to build from our founding nine to a maximum of 15. We will leverage existing board networks to identify potential new members who bring diverse experience and expertise that would compliment our existing composition, with a lens towards diversity, community experience, and additional skill sets.

Upon confirmation and approval from the board chair and a majority of existing board members, incoming board members will receive informational briefings on the academic, organizational, and financial history, progress, and trajectory of the proposed school. A school site visit, individual meetings with members from the Leadership Support Team and founding teaching team, as well as in-depth time with the School Director will offer a lens in the current operation of the school. In addition to academic score reports, organizational charts and policies, and financials, new board members will spend time with the board chair to acclimate to board of the proposed school. Lastly, the incoming board member will offer a list of questions, thoughts, and ideas at the next board meeting to bridge any gaps and knowledge and integrate into the School Board.

6. A clear description of effective governance procedures, including an explanation of the procedure by which current proposed school governing board members were selected and how any vacancies will be filled; an explanation of how often the board will meet both during start-up and during the school year; any plans for a committee structure and identification of chairs for any proposed committee(s); and a description of the governing board meetings, including how and where meetings will be conducted, how the governing board will provide meaningful access to the public, and if board meetings are to be conducted virtually (such as through conference calls, videoconference, or web conference).

Governance Procedures | All methods for board elections and turnover are delineated in DreamHouse’s bylaws, found in Governance Section 1. Existing DreamHouse School Board member may recommend a potential board member to the School Board at any time; a simple majority vote and approval from the board chair would qualify this person.

School Board members serve a term of three (3) years from the date of their appointments, or until their successors are seated. A full three-year term is considered to have been served after three annual meetings. Board members serve staggered terms to balance continuity with new perspective. Any vacancy occurring on the School Board and any position to be filled by reason of an increase in the number of board members may be filled, upon recommendation of a sitting board member, by a majority vote. A director elected to fill the vacancy will be elected for the unexpired term of his/her predecessor in office. A board member may resign at any time by filing a written resignation with the School Board chair.

The Board may remove any member by a majority vote of the entire School Board at any regular or special meeting of the board, provided that a statement of the reason or reasons shall have been mailed by registered mail to the member proposed for removal at least thirty (30) days before any final action is taken by the board. This statement will be accompanied by a notice of the time when, and the place where, the board is to take action on the removal. The member shall be given an opportunity to be heard and the matter considered by the board at the time and place mentioned in the notice.

Board members are elected by the board and will meet monthly during start-up and bi-monthly during the first academic year of operation (2017-18), moving to quarterly meetings from the 2018-19 school year and beyond; the last meeting of the calendar year will be deemed the annual meeting. Board agendas are distributed to board members at least one week prior to each meeting. All meetings of the School Board and of board committees shall be called, noticed, and

held in compliance with Hawai'i State Law. DreamHouse shall keep adequate and correct records of account and minutes of the proceedings of its meetings.

Meetings shall be conducted at the to-be-determined school site in 'Ewa Beach, unless it is determined more feasible to schedule meetings at a different geographic location, such as town or at a central location for our board members. Board meetings will generally follow: call to order; ongoing business and follow-up; urgent, high priority items; academic performance committee; organizational governance committee; finance/fund development committee; next steps and timeline; closing.

Meetings will generally be led by board chair and School Director, as well as committee members as appropriate. Meeting notes will be uploaded to DreamHouse website within 48 hours of board meeting, as well as distributed via listserv. Board members who are not able to attend meetings in person will be required to attend virtually via conference call, videoconference, or web conference.

Committees | The School Board will initially consist of three committees: Academic Performance, Organizational Governance, and Finance/Fund Development. Election to these committees will be via self-election, majority vote, and board chair ratification. There is not official structure within individual committees as of the time of this application, other than the Finance/Fund Development Committee, which will initially be chaired by the treasurer.

Academic Performance Committee - The Academic Performance Committee maintains oversight of the school's performance against academic goals as articulated and adopted in the accountability plan. While all board members regularly review and discuss student achievement progress and metrics, the committee has several specific responsibilities: reviews and recommends the annual academic accountability plan for adoption; provides regular updates regarding school's progress toward academic outcomes; educates Board members about the adopted academic goals and assessment tools and their relation to the school's mission.

Experience in organizational management, instructional leadership, and/or a desire to develop expertise in these areas are important qualifications. The Academic Performance Committee reports to the full board.

Organizational Governance Committee - The primary responsibilities of the Organizational Governance Committee are to: identify, recruit, and nominate persons to serve as members and officers of the School Board, school Leadership Support Team, and teaching team, with support from the overall board; orient and train new and current board members; oversee adoption and implementation of board policies, bylaws, and due diligence functions; and oversee annual evaluation processes of each board member and the board as a whole as measured against board responsibilities and performance expectations. In addition, they will serve as a human capital and recruitment pipeline for potential school site staff, working closely with the School Director in finding talent and building a deep pool of qualified candidates to grow the school.

Identification of well-qualified board candidates results from a carefully planned process designed to obtain capable, knowledgeable, and representative leadership for the school. The primary steps in this process are:

- Determining what skills and attributes are needed to strengthen the School Board, school Leadership Support Team, and teaching team;
- Developing and vetting a list of prospective nominees;
- Recruiting and interviewing strong candidates, or in the case of the school Leadership Support Team and teaching team, supporting the School Director in recruitment, interviewing, and hiring;
- Providing initial orientation and ongoing training to board members.

For a variety of reasons, at-large vacancies may occur on the board during the period between elections. When these occur, it is primarily the responsibility of the Governance Committee to recommend a suitable candidate for appointment by the board to fill the vacancy; this is applicable as well for vacancies within the school Leadership Support Team, and teaching team. The Governance Committee reports to the full board.

Finance/Fund Development Committee - The Finance Committee coordinates the board's financial oversight responsibilities by recommending policy to the board, interpreting it for the staff, and monitoring its implementation. The committee also provides oversight of the organization's financial audit. Specifically, the committee: monitors the organization's financial records; reviews and oversees the creation of accurate, timely, and meaningful financial statements to be presented to the board; reviews the annual budget and recommends it to the full board for approval; monitors budget implementation and financial procedures; monitors budget assets monitors compliance with federal, state, and other financial reporting requirements; and helps the full board understand the organization's financial standing. In order to fulfill these responsibilities, the Finance Committee:

- Reviews adequacy of the organization's internal control structure;
- Reviews activities, organizational structure, and qualifications of internal audit;
- Reviews policies/procedures in effect for review of executive compensation/benefits;
- If necessary, institutes special investigations and, if appropriate, hires special counsel or experts to assist;
- Performs other oversight functions as requested by the full board.

The treasurer chairs this committee. Committee members have a strong background in accounting, finance, or business. The Finance Committee reports to the full board.

The fund development aspect of this committee is responsible for the board's participation in resource development and fundraising by developing a culture of philanthropy among members. While all board members are expected to support fund development efforts, the committee has several specific responsibilities:

- Reviews and recommends the school's annual fundraising plan for adoption;
- Strategizes with School Director to maximize relationships for the benefit of the school and to engage board members in specific fund development efforts;
- Provides regular updates to the board regarding the school's fundraising activities and outcomes;

- Educates board members about the importance of philanthropy to the school and the importance of conducting a donor-centered fund development program;
- Partners with 501(c)(3) board in order to maximize fundraising efforts.

A commitment to building a culture of philanthropy in the school as well as prior fund development experience and/or a desire to develop expertise in this area are important qualifications.

7. A clear description of any existing relationships that could pose actual or perceived conflicts if the application is approved, the specific steps that the proposed school governing board will take to avoid any actual conflicts and to mitigate perceived conflicts, and appropriate Code of Ethics and Conflict of Interest policies or procedures, provided as **Attachment V (no page limit)**, that will minimize real or perceived conflicts and align to applicable laws.

While conflict of interest and conflict mitigation procedures are listed below, there are four potential scenarios that our applicant team would like to highlight. Please see **Attachment V** for Conflict of Interest Policies.

- *DreamHouse Applicant Group, DreamHouse, Inc. 501(c)(3) Nonprofit Board, and School Director* – No board members from the school board and the non-profit board will sit concurrently on either board, with exception of the School Director, who will be non-voting
- *Hawai'i State Public Charter School Commission Members*. Multiple members of our founding applicant team have personal and professional relationships with Commissioners Jill Baldemor and Mitch D'Olier.

8. A clear description of sound plans for increasing the capacity of the proposed school governing board, orientation of new members, and ongoing training and development for members, including reasonable timelines, specific and thoughtful topics and capacities to be addressed, and requirements for participation.

As mentioned in our bylaws, we seek board members who are from the local community, from the Hawaiian Islands, and / or individuals who may not reside in Hawai'i, but have a deep commitment to the children and community of 'Ewa Beach. As such, we will leverage existing and developing networks to identify, recruit, and onboard new School Board members to increase the overall capacity of our governing board.

Due to its depth and alignment with our school's purpose, the applicant board has leveraged the *State of Colorado's Charter Board Governance Training Guide* for this section. As mentioned in *Chapter 2: Identification and Recruitment of Board Members*, our aim is to build a public school leadership team around shared values, through which we will govern the proposed school. Our main strategies for recruitment and increasing our board capacity include: (1) leveraging our Organizational Governance Committee, (2) leveraging the network of our associated Nonprofit, (3) building new board member recruitment into the strategic growth priorities of the school, (4) maintaining term limits and holding expectations that board members actively search for their replacement, and (5) maintaining a public, interactive website that profiles board members, responsibility descriptions, board vision, minutes, and other business in order to add transparency and opportunities to engage with our governance team and process. A sample timeline is as follows:

2016-17, *planning year* - establish founding board and initial members of the Organizational Governance Committee, actively preparing for additional board member recruitment through (1) preparing a board recruitment packet (including, but not limited to: bylaws, position description, charter contract, strategic plan, founding governing board profile with list of current members), (2) developing within the strategic plan priorities for increasing board member diversity, (3) conducting first round of personal contact with top board recruits (lead by board chair, School Director, and point of contact from board, if applicable), (4) schedule and conduct orientation sessions with new board members, (5) selection and official appointment of new board members to charter School Board.

2017-18, *Year One* - continue with staggered terms of board members while actively recruiting new members to build board size to no more than 15 members, all with a diverse range of backgrounds, experiences, and expertise; proceed with steps 3, 4, and 5 to recruit, matriculate, and onboard new board members.

2018-19, *year 2* - continue with staggered terms of board members while actively recruiting new members to build board size to no more than 15 members, proceeding with steps 3, 4, and 5 to recruit, matriculate, and onboard new board members.

2019-20+, *year 3+* - continue with staggered terms, exiting board members are replaced by new, and recruitment activities continue.

Orientation of New Board Members - As highlighted in the *State of Colorado's Charter School Board Governance and Training Guide (Chapter 3: Orientation and Training of Board Members)*, we will divide orientation and support of board members over four stages: (1) during recruitment, (2) new member orientation, (3) early service (first three months), and (4) ongoing orientation (past three months).

(1) *Recruitment Stage* - As mentioned above, orientation of board members of the charter school actually begins early in the recruitment process. In the recruitment stage, by means of printed material mailed to the prospect as well as a face-to-face orientation session, the prospect received an overview of the charter school's mission and strategic plan, the charter school contract, the educational program, financial data, and other background information. The prospect will also receive a list of expectations of board members including number of meetings, committee assignments, length of board term and an idea of the time commitment required. They may also receive a list of current board members and other key volunteers, as well as a copy of the charter school bylaws and the last annual audit of the school.

(2) *New Member Orientation* - After the new member has been brought onto the charter School Board the new board director orientation process continues in the following way: before the first board meeting, a meeting will be scheduled between the new board director and key individuals in the charter school (primarily School Director). A detailed board director manual will be provided, which will include bylaws, articles of incorporation, the charter school contract, a thorough description of the educational program including educational philosophy, curriculum, instructional methods, assessment, the current budget, last audited financial statements, a list of board members and their addresses (to be introduced at next meeting), lists of committees and any staff assignments, copies of minutes for the previous year and a copy of the charter school strategic plan.

(3) *Early Service, First Three Months* - Regular check-ins between the new board member and their board mentor to answer questions and help the member become acquainted; new board director

has become involved in their chosen committee assignment and continues orientation to the work of that specific committee; continued engagement with background materials.

(4) Ongoing Orientation, Past Three Months - Continued assistance and support so new member can carry out the responsibilities effectively; opportunities for board members to attend special workshops related to their assignments and interests. In addition, special leadership training opportunities to current and prospective officers (president, vice president, secretary, treasurer), which will be determined; opportunities to expand responsibilities of board members and rotate committee assignments to help satisfy the interests and needs of each board director, providing opportunities for continuous development of the volunteer leaders for the charter school.

9. A clear description of any advisory bodies or councils, including clear roles and duties, the planned composition, the strategy for achieving that composition, and resumes of any individuals that have been identified to serve on these advisory bodies or councils, provided as **Attachment W (no page limit)**. The description must include an explanation of an effective relationship between the advisory bodies or councils and the proposed school governing board and the proposed school's leadership team or management team, including the role of parents or guardians, students, and teachers and the reporting structure as it relates to the proposed school's governing board and leadership.

Not applicable because the proposed school and governing board do not have any advisory bodies or councils. Please see **Attachment W** for strategy and timeline.

B. Performance Management

1. Comprehensive and effective plans for evaluating and monitoring academic, financial, and organizational performance that explain how the proposed school will measure and evaluate performance data, including:
 - a. Academic Performance Data Evaluation Plan. A comprehensive and effective plan and system for:
 - i. Collecting, measuring, and analyzing student academic achievement data of individual students, student cohorts, and the school as a whole—throughout the school year, at the end of each academic year, and for the term of the Charter Contract—including identification of the student information system to be used;
 - ii. Using the data to refine and improve instruction, including descriptions of training and support that school directors, any management team, teachers, and governing board members will receive in analyzing, interpreting, and using academic performance data to improve student learning; the qualified person(s), position(s), and/or entities that will be responsible for managing the data, interpreting it for teachers, and leading or coordinating data-driven professional development to improve student achievement; and how the person(s), position(s), and/or entities will be provided time to complete the aforementioned collection, analysis, management, interpretation, and coordination of data-driven professional development; and
 - iii. Reporting the data to the school community.

Academic Performance Data Collection and Preparation | Within the Academic Plan's Curriculum Instruction & Design Use of Data section, a comprehensive assessment administration and data collection, measurement, and analysis framework, calendar, and

protocol is outlaid. We will use this framework, along with our RTI model described in the Curriculum Instruction & Design section pertaining to Special Populations and At-Risk Students, to collect and analyze data for individual students, subgroups, and our school-wide cohorts. In year 2017-18, this will mean 100 6th graders. In 2017-18, we will use internal Excel-based models, as well as Infinite Campus to collect and analyze student data.

For purposes of alignment, we will collect, codify, and have for analysis all data sets pertaining to STRIVE HI measurement (e.g. proficiency levels across ELA, Math, and Science; growth in proficiency across those subjects; subgroup performance and gaps). All data points, particular trends (in successive years), and comparisons to alike schools and the complex will be compiled and disseminated at least a week prior to bi-monthly (Year One) and quarterly (years 2+) board meetings to prepare board members for interpretation, analysis, and recommendations for the Leadership Support Team of DreamHouse.

Using the Data: Leadership Support Team Training - To support the School Board in their active governance and leadership of DreamHouse, the on-site management team (Leadership Support Team) must be fully qualified in not only collecting and analyzing data themselves, but also training and supporting School Board members in doing so from their vantage point. In order to effectively prepare the team to do this, the following training and support methods will be implemented: hiring for data fluency; DataWise & MeetingWise protocols; teaching teachers; shadow at other schools.

Stakeholders in data collection, interpretation, analysis, and decision-making: teachers, Leadership Support Team, board members, students, parents. We will leverage Infinite Campus along with internal data collection methods (to be developed by Leadership Support Team) to support analysis, protocols, and stakeholder engagement.

Semi-annual newsletters and DreamHouse website posts will be made pertaining to overall proficiency, progress, and growth of our students and school. We will highlight exceptional achievement and growth, while also transparently sharing our strategic priorities and focus for the coming months, semester, summer, etc. Year-end snapshots and publications will also be circulated highlighting proficiency and growth.

- b. [Financial Performance Data Evaluation Plan.](#)** A comprehensive and effective plan and system for maintaining, managing, compiling, and interpreting financial data monthly, quarterly, annually, and for the term of the Charter Contract, including descriptions of the qualified person(s), position(s), and/or entities that will be responsible for maintaining the data, managing the data, compiling it, and interpreting it for the school director and governing board and how the person(s), position(s), and/or entities will be provided time to complete the aforementioned maintenance, management, compiling, and interpretation.

Financial Governance Pillars | Three pillars modeled from the Commission as well as components from National Alliance for Public Charter Schools guidelines will govern the financial management of DreamHouse: (1) real-time information, (2) transparency, and (3) modeling. The primary people responsible for managing our financial health will be the School Director, Operations Manager, board chair, and financial committee.

(1) *Real-time Information.* Up-to-date financial information for our school is critical. Our Operations Manager will keep a weekly pulse on cash balance, accounts payable and receivable balances, and indicators that will allow us to offer an immediate financial picture upon request.

(2) *Transparency.* Information flow and multiple viewpoints on financial health is equally as important to the accuracy of information. At a minimum, on a monthly basis, the Operations Manager, School Director, board chair, financial committee lead, and Nonprofit board chair will be briefed on current and projected financial picture.

(3) *Modeling.* DreamHouse financial models and projections will be actively utilized so that key personnel can consider different scenarios and proactively plan for the school.

The following financial indicators will help guide our analysis, modeling, and decision-making (including, but not limited to): *Current ratio and quick ratio; unrestricted cash on hand; days cash on hand; enrollment variance; total margin; debt/assets ratio; debt-service amount; cash flow; cash flow per student; unrestricted fund balance percentage; change in total fund balance; accounts payable; accounts receivable; fundraising; credit facility status.*

Financial Performance Indicators*	Target / Standard
Current Ratio	1.1 or higher
Unrestricted Year-End Days Cash on Hand	60 days or more
Enrollment Variance	95% or higher
Total Margin	0% or higher
Debt to Assets Ratio	50% or less
Cash Flow	\$0.00 or more
Unrestricted Fund Balance Percentage	25% or higher
Change in Total Fund Balance	\$0.00 or more

** Per August 2015 Contract Renewal Process Guidelines from Hawai'i Charter Commission*

Financial Governance Personnel - Key personnel overseeing financial health of DreamHouse: School Director, Operations Manager, board chair, School Board finance committee chair, and Nonprofit board chair (as strategic thought partner).

Financial Governance Timeline & Checkpoints

- *Daily:* Checks account balances and manages daily financial transactions. (Operations Manager (OM));
- *Weekly:* As part of weekly check-in, OM & SD review financial transactions and cash movement of the week, upcoming transactions, impact on financials, and prep for additional communication with other stakeholders. (OM, School Director (SD));

- *Bi-weekly (Year One); monthly (year 2+)*: Check in to discuss (1) school-based finances, (2) current cash flow trends and transactions, (3) overall financial picture with ratio and indicator analysis, and (4) additional cash and fundraising needs (including contingency plans, 501(c)(3) support, finance committee support, and Commission communication) (SD, School Board chair (SBC));
 - *Bi-weekly (Year One); monthly (year 2+)*: Check in to (1) highlight overall cash needs, (2) fundraising campaign progress, (3) gaps and support opportunities, (4) potential transactions and logistics (SD, Nonprofit board chair (and SBC as needed));
 - *Monthly*: Monthly financial newsletter to primary stakeholders and decision-makers with regard to financial health, recent cash flows, A/P, A/R, fundraising pipeline, next steps, etc. (loop in Commission as necessary) 9 OM, SD, SBC, NPBC, financial committee lead);
 - *Bi- monthly (Year One); Quarterly (year 2+)*: Quarterly board meetings highlight many of the topics listed above and provide space for SD, SBC, and finance committee lead to paint financial picture and empower fellow board members to weigh in and contribute to increasing financial position and ensuring viability (friendraising, fundraising, connecting, etc.) (School Board);
 - *Bi- monthly (Year One); Quarterly (year 2+)*: Bi-monthly meetings during Year One to maintain fundraising efforts to get school off the ground; quarterly meetings year two and beyond to maintain support structure and fundraising efforts to fuel growth of school and increase retained earnings (Nonprofit Board).
- c. Organizational Performance Data Evaluation Plan.** A comprehensive and effective plan and system for maintaining, managing, compiling, and interpreting organizational performance data monthly, quarterly, annually and for the term of the Charter Contract, including descriptions of the qualified person(s), position(s), and/or entities that will be responsible for compiling data on performance and interpreting it for the school director and governing board and how the person(s), position(s), and/or entities will be provided time to complete the aforementioned compiling and interpretation.

Organizational Performance Data Evaluation Plan - Three main buckets: (1) compliance, (2) climate, and (3) charter. Personnel mainly responsible for managing, maintaining, and interpreting systems and data pertaining to organizational performance: Leadership Support Team (Operations Manager, Instructional Coach, School Director), board chair, and governance committee; teachers and overall School Board will help in contributing to and owning this system as well.

(1) Compliance - Our organizational oversight is grounded in the organizational performance framework components of legal compliance, accountability, transparency as outlined in the State Commission’s charter contract renewal process (August, 2015). There are six main areas in the framework: (1) education program, (2) financial management and oversight, (3) governance and reporting, (4) students and employees, (5) school environment, and (6) additional obligations (TBD). Our goal is for all six areas to meet internal compliance metrics, and the first five meeting proficiency for the Commission. The following components of compliance will be actively managed and maintained at DreamHouse as part of ongoing operations:

WHAT	OWNER	SUPPORT	WHEN
Special education student files	Special Ed Lead	Operations Manager	Ongoing; collected in the beginning of the year and managed throughout
Governing board agenda, minutes, roster	School Director	Operations Manager	Bi-monthly (planning period and Year One) and quarterly (year 2+), agenda located within internal folders, minutes and roster posted on DreamHouse public website
School Director evaluation system	Board Chair	Operations Manager	Semi-annual School Director evaluation led by School Board chair; system support on school side from Operations Manager
Notice of student privacy rights (FERMA)	Operations Manager	School Director	Beginning of year; records held centrally, internally at DreamHouse
Student records	Operations Manager	School Director	Beginning of year; records held centrally, internally at DreamHouse; also, academic components held within ILDPs (Infinite Campus)
Non-HQT notifications to parents	Operations Manager	School Director	Sent in beginning of the year communication and as appropriate if new teachers who are non-HQT status are hired
Criminal background checks	Operations Manager	School Director	Part of onboarding and hiring; kept internally, centrally
Teacher evaluation system	Instructional Coach	School Director	Ongoing and managed by Instructional Coach; evaluations occur quarterly as outlined in
Supplemental collective bargaining agreement(s)	Teachers, School Director	Board Chair	This will not be drafted until a founding group of teachers determines the gaps and needs of our school day and year; spring / summer 2018
Safety plan	Operations Manager	School Director	Built out during planning year and when facility is identified; teachers, students, and staff will all receive training and orientation during beginning of year
Fire drill log	Operations	School	Beginning of the year set-up to code;

	Manager	Director	Operations Manager oversees fire drills, safety procedure, and log maintenance
Driver qualification folder	Operations Manager	School Director	Staff undergo background checks and license / insurance records maintained internally, held centrally
Vehicle inspection documents	Operations Manager	School Director	Vehicle inspections for staff and for any vehicles being used during school time, with students, are fully inspected and registered; records maintained internally, held centrally
Certificate of occupancy & building permits	Operations Manager	School Director	Obtained once building is identified and up-to-code; maintained internally, held centrally
Student health services	Operations Manager	School Director	Student health records obtained during school matriculation; adjustments made during school year and maintained internally, held centrally;
Student withdrawal / transfer procedures	Operations Manager	School Director	Maintained internally, held centrally; transfer procedures will be in line with Complex procedures (built out during planning year in collaboration with Ilima, Ewa Makai initially)

(2) *Climate* - Our organizational performance evaluation and governance strategy around climate will pertain to (1) staff, (2) students, and (3) families and community.

(3) *Charter* - Our organizational performance evaluation and governance strategy around our charter is an accountability and transparency measure for our School Board, Leadership Support Team, and overall school. This is less of a new area to review and more so a strategy and lens through which to view our overall progress and trajectory as a school within our three main focus areas: academics, organizational, and financial.

As part of bi-monthly (Year One) and quarterly (year 2+) meetings, the School Board will follow a template (built out during the planning year) that (a) raises up urgent and immediate issues and challenges facing the school, (b) gives space for each of our committees to highlight progress, challenges, support needed, and next steps, and (c) strategizes our board, school, Leadership Support Team, and supporting Nonprofit's months or quarter ahead.

2. A clear description of thoughtful, appropriate corrective actions the proposed school will take if it falls short of:

- a. Student academic achievement expectations or goals at the school-wide, classroom, or individual student level, including an explanation of what would trigger such corrective actions and the person(s), position(s), and/or entities that would be responsible for implementing them;
- b. Financial performance standards set in the Financial Performance Framework, including an explanation of the actions that would be taken if the proposed school is issued Notices of Concern or Deficiency under the terms of the Charter Contract, if the independent auditor issues findings, or if the proposed school encounters financial difficulties; and
- c. Organizational performance standards set in the Organizational Performance Framework, including an explanation of the actions that would be taken if the proposed school is issued Notices of Concern or Deficiency under the terms of the Charter Contract or if the proposed school has a corrective action plan approved by the Commission.

Corrective Action | The overall pedagogy applied to corrective actions the school will take if it falls short of academic goals, financial performance standards, or organizational performance standards will follow a similar philosophy that is outlined in our expectations and accountability (“Student Discipline”) section of the Academic Plan; we believe that applying a similar accountability framework (e.g. clarity, individual goals, identification of breach, restoration opportunity, accountability, separation) to adults is culturally aligned.

Stage	Performance Management Corrective Actions
1	SYSTEM CLARITY Clear performance metrics, timeline, and expectations established at beginning of school contract term and board founding.
2	PERSONNEL CLARITY Clarity for personnel expectations for all individuals involved with management and governance of school (primarily Leadership Support Team, School Board); Nonprofit board is responsible for support, but not for management or governance.
3	PERFORMANCE LAPSE IDENTIFIED A breach of culture occurs if (a) data is firmly pointing to a lapse in performance or progress within academic, organizational, or financial buckets, and/or (b) specific personnel has been identified at being directly involved with this breach or is contributing directly to this underperformance.
4	IMPROVEMENT EFFORT LEVEL I Leadership Support Team and/or board clearly addresses this breach and respective personnel are given opportunity to make corrective actions and improve performance situation (on a to-be-determined, finite timeline).
5	IMPROVEMENT EFFORT LEVEL II If corrective action cannot be achieved through empowering respective personnel to make performance improvements, board chair will work with appropriate personnel in the management area to design improvement plan for performance area and/or personnel; if in fact the gap is occurring at the board or board chair level, the overall board and board leadership

	(vice chair, treasurer, and clerk) will assist in implementing improvement plan.
6	CONTINGENCY & SEPARATION If no progress is made on improvement plan after specified, limited period of time, board and Leadership Support Team will consider additional contingency options and potential personnel separation from performance area and/or school.

Academic Corrective Action | Aligned to the Academic Goals & Targets defined in the Academic Plan, DreamHouse will focus broadly on proficiency across the (a) the school as a whole, (b) proficiency and gap closure amidst sub-groups, and (c) proficiency and progress for individual students. In line with our Response To Intervention (RTI) model, what would trigger corrective action within the academic bucket would be a student falling a certain amount of years or grade percentage points behind the moving average or overall proficiency expectations of the class, assessment, or grade. Across the three identified areas, if at any points performance begins to drop below specified levels within the Academic Goals & Targets section, the board will begin proceeding through the corrective action steps as outlined above, beginning with clearly identifying the performance gap, associated personnel, and potential root causes and contributing factors.

Financial Performance Standards | The DreamHouse financial performance framework detailed within our Evaluation Plan sets forth our strategy for aligning internal financial measurement and performance metrics to the levels set forth by the Commission. Our performance standards will fall across the following internal stages: (1) meets, (2) barely meets, and (3) does not meet.

Meets: Given current financial situation with regard to cash, liquidity, solvency, leverage, and projections, if DreamHouse holds the assets and cash position aligned to the metrics outlined by the Commission, within that individual metric, DreamHouse will “meet” the financial criteria.

Barely Meets: If financial indicators meet performance standards, but do so on a thin margin (“thin” to be determined with accurate risk-weighting), the indicator will be identified as barely meeting performance expectations and will be flagged as a priority metric for stakeholders (i.e. board chair, finance committee, School Director, etc.)

Does Not Meet: If a financial metric falls below the required level as set out by the Commission, the metric will be identified as “does not meet” the financial performance framework expectations and will be flagged as high priority and will be addressed in one:one meeting with School Director and board chair, as well as any additional stakeholders who are identified as proximate to the performance area.

Contingency: If financial metrics remain in the “does not meet” category for an extended period of time (to be determined), contingency pathways will be considered to keep the school in operation.

Dissolve: If contingency pathways are not effective, nor realistic, and the school’s financial condition continues to deteriorate, school closure / shut down procedures will be explored with the School Board, Complex leadership, and Commission.

Meets - If a financial indicator falls within the “meets” criteria as outlined by the Commission and DreamHouse internal thresholds, we (stakeholders identified in the evaluation plan) will

determine why this is the case, model projections and scenarios that pressure test the current state, and set realistic projections and goals for the month, quarter, and year.

Barely Meets - If a financial indicator is technically above the threshold set by the Commission, but is only above the identified threshold by a small margin (levels to be determined during planning year), then we will consider this financial metric in the “barely meets” category and flag it as a priority area. If this happens, we will initiate our Performance Management Corrective Actions protocol at the third stage that would mean:

1. Clearly identifying the financial metric that is closing in on not meeting the performance standard;
2. Identifying personnel and stakeholders influencing the indicator;
3. Giving these personnel and stakeholders an opportunity to enact a plan to improve the indicator with set checkpoints and progress measures;
4. Supporting and managing the implementation and progress checks of this plan;

If the financial indicator continues to deteriorate towards or below the performance threshold, we would then tighten management of this area from a school leadership and board leadership perspective, moving towards direct management of the area.

Does Not Meet - If a financial metric falls below the threshold set forth by the Commission, we will move immediately to the third, fourth, and most likely the fifth stage of the Performance Management Corrective Actions protocol, identifying the area of concern and moving into an immediate improvement plan consisting of an improvement path with metrics, benchmarks and checkpoints, a timeline, key personnel involved, and contingency paths if improvement is not shown. With regard to financial performance, multiple metrics not meeting performance standards could have larger implications on the operation or the school and our viability as an organization.

Organizational Performance Standards | In line with our Organizational Performance Framework and metrics outlined in our evaluation plan, we will align corrective action to our three main buckets of (1) compliance, (2) climate, and (3) charter; the charter bucket will cover additional organizational issues not driven by Commission-specified compliance metrics, or climate issues driven by staff, student, family and community surveys and feedback.

(1) Compliance - For each of the items listed in the compliance review section of the 2015 contract renewal process established by the Commission, the main owner and support personnel will drive action and compliance on each item on an ongoing and appropriate timeline as outlined within our evaluation plans. If at any time any of the compliance items are out of compliance internally, we will apply the pedagogy above and move into our third stage of identifying the performance lapse, and then allowing the area-owner limited space and additional support to devise an immediate action plan to move the out of compliance item into compliance swiftly, along with a specified timeline, benchmarks and checkpoints, and a legitimate pathway to compliance. If empowering the item-owner proves insufficient and progress towards compliance is not evident, the School Director and potentially the board chair will engage in improvement efforts (please note: board members will only be involved with critical non-compliance items that put the charter at risk).

(2) *Climate* - Survey and feedback data, both quantitative and qualitative in nature, from staff, students, families and community members is vital to the self-reflective and growth-oriented mindset our school community and culture. Positive feedback will be shared internally at a staff level and used as culture- and foundation-building affirmation. Feedback from various stakeholders offering suggestions will be taken into consideration by the Leadership Support Team and highlighted for the entire staff to consider, if deemed appropriate, feasible, and vision-aligned. Negative feedback and conversations about DreamHouse that could be weighing on culture will be addressed appropriately for internal / external issues.

(3) *Charter* - For organizational issues that do not fall within organizational compliance as set out by the Commission, or climate or culture issues that may be driven by staffing and/or organizational structure, we will codify these as Charter-related issues and will apply the pedagogy from above to each, unique situation.

Actions that would be taken if the proposed school is issued Notices of Concern or Deficiency - Aligned with our corrective pedagogy outlined above, the following actions would be taken if DreamHouse is issued any Notices of Concern or Deficiency from the Commission: (1) issue highlighted and clearly identified at board level; (2) initiative initial investigation; (3) if necessary, improvement plan initiated; (4) implement secondary level of support; and (5) engage Commission.

3. If already developed, School-Specific Measures, provided as **Attachment X (no page limit)** and using the School-Specific Measures Template ([Exhibit 5](#)), that propose reasonable assessments that are aligned with the Academic Plan.

Not applicable because School-Specific Measures are not yet developed.

C. Ongoing Operations

1. If the proposed school will provide daily transportation, a sound plan describing the transportation arrangements for prospective students, including a description of how the proposed school plans to meet transportation needs for field trips and athletic events.

Not applicable because the proposed school will not provide daily transportation.

2. Sound plans for safety and security for students, the facility, and property, including descriptions of policies and the types of security personnel, technology, and equipment that the proposed school will employ. If the proposed school has a *virtual or blended learning program*, the description must include physical or virtual security features to deter theft.

Safety and Security | Culture, facility, health, emergency, and substance headlines:

- *DreamHouse Culture* - Sound hiring policies, a culture of present, trained adults, and an acute focus on a safe, welcoming, positive environment will help establish a culture of safety and security within our school.
- *Facility Safety* - While we are still in the process of identifying a facility location, we have established the following approach to developing safety plans. The school facility will comply with all applicable state, federal, and local regulations and maintain readily accessible records for such regulations. DreamHouse will test sprinkler systems, fire extinguishers, fire alarms, and other safety equipment annually at its facilities to ensure they are maintained in operable condition at all times.

- *Compliance with Safety Requirements Assurance* - DreamHouse assures that the school's facilities and any modifications made to its facilities will comply with state building codes, federal Americans with Disabilities Act (ADA) access requirements, and other applicable fire, health and structural safety requirements, and will maintain on file readily accessible records documenting such compliance.
- *School and Student Safety Plan Assurance* - DreamHouse assures that a school and student safety plan will be developed prior to school opening and kept on file for review, and that school staff, families, and students will be trained annually on the safety procedures outlined in the plan. If HIDEOE facilities are used during the term of this charter, DreamHouse shall abide by all HIDEOE policies relating to Maintenance and Operations Services. The safety plan will be developed by the Leadership Support Team and will include pertinent components (e.g. lockdown procedures, visitor policies, illness, abuse reporting, injury protocol, tsunami warnings, etc.)
- *Fire, Lock-down, and Evacuation Drills* - Students and staff will participate in fire drills once per quarter, and at least one lock-down drill annually. As noted above, the school will develop a school safety plan that will be kept on file for review. School staff will be trained annually on the safety procedures outlined in the plan.
- *Health and Safety Procedures* - In order to provide safety for all students and staff, DreamHouse will adopt and implement full health and safety procedures and risk management policies at our school site in consultation with insurance carriers and risk management experts prior to the school's opening. The health and safety policy will be annually updated and reviewed, in consultation with staff and families. This policy will be distributed to all staff and families. The health plan will be developed by the Leadership Support Team and will include pertinent components (e.g. TB testing, immunizations, in-school medication, vision / hearing, blood borne pathogen prevention, CPR, drug/alcohol prevention, etc.)
- *Emergency Preparedness* - DreamHouse will adhere to an Emergency Preparedness Handbook drafted specifically to the needs of the school site in conjunction with law enforcement and the Fire Marshall prior to school opening. This handbook will include, but not be limited to, the following responses: fire, flood, earthquake, tsunami, terrorist threats, gang activity, and hostage situations. If assuming a facility used prior as a school site, any existing emergency preparedness plan for the school site shall be used as a starting basis for updating the handbook for DreamHouse. All DreamHouse staff will be trained on emergency preparedness procedures.
- *Comprehensive Sexual Harassment Policies and Procedures* - DreamHouse is committed to providing a school that is free from sexual harassment, as well as any harassment based upon such factors as race, religion, creed, color, national origin, ancestry, age, medical condition, marital status, sexual orientation, or disability. DreamHouse will develop a comprehensive policy to prevent and immediately remediate any concerns about sexual discrimination or harassment at DreamHouse (including employee to employee, employee to student, student to employee misconduct, and student to student). Misconduct of this nature is very serious and will be addressed in a sexual misconduct policy that is in development.

3. If the proposed school will provide food service, a sound plan describing the proposed school's plan for providing food to its students, including plans for a facility with a certified

kitchen, transporting food from a certified kitchen, or other means of providing food service that is in compliance with applicable laws.

Not applicable as DreamHouse is currently conducting in-depth market research and due diligence around providing universal food service.

D. Student Recruitment, Admission, and Enrollment

1. A sound, thoughtful, and comprehensive plan for student recruitment and marketing that will provide equal access to interested students and families and specifically describes plans for outreach to families in poverty, academically low-achieving students, students with disabilities, and other youth at risk of academic failure, as well as plans for promoting socioeconomic and/or demographic diversity, including a description of how the proposed school will attempt to make itself attractive to families with relatively higher incomes and/or levels of formal education if the proposed school is projecting a high percentage of free and reduced lunch and intends to achieve socioeconomic and/or demographic diversity.

Our vision at DreamHouse is to have a diverse student body that is reflective of the ‘Ewa Beach community, integrated across racial and socioeconomic lines. We will support all students who matriculate into our school through a randomized, public lottery.

Recruitment Plan - Recruitment for students to come to DreamHouse for Year One (2017-18 school year) will begin as soon as a decision from the Commission is rendered. We will align our recruitment plan to the academic quarters of the 2016-17 year.

Year Zero (2016-17): Timeline

When	Headline	Actions
<i>Recruitment Phase</i>		
Aug, Sep (Q1)	Announce	Highlight news and announcement within ‘Ewa Beach community to build awareness; highlight model, vision, mission, values, and timeline;
Oct, Nov, Dec (Q2)	Recruit & Inform: Part I	Round I of Canvassing / walking ‘Ewa Beach highlighting information sessions, contact, timeline; Enrollment forms are made available in November;
Jan, Feb, Mar (Q3)	Recruit & Inform: Part II	Round II of Canvassing and walking neighborhoods in ‘Ewa Beach handing out information and highlighting a) monthly information session, b) contact information, and c) timeline, d) March Lottery
<i>Admission, Enrollment, and Matriculation Phase</i>		
Mar, Apr, May (Q4)	Lottery	March Lottery – public lottery in ‘Ewa Beach to identify incoming 100-student 6 th grade class; April follow-up and matriculation procedures, open house

		#1; May home meetings with 100 6 th graders to prep for summer work and pre-enrollment expectations (Leadership Support Team-, board-driven);
Jun, Jul Summer	Enrollment & Matriculation	July open house #2 to prepare for 2017-18 school year (Year One);

Year One (2017-18): Outreach Strategies

- Development and distribution of marketing materials in English, Tagalog, and any other identified language as appropriate;
- Presentations and information distribution at community organizations and meetings, such as ‘Ewa Beach Neighborhood Board, ‘Ewa Beach Boys and Girls Clubs, local PTO and elementary school meetings (if appropriate), Lions Club, church gatherings (if appropriate), and other local organizational meetings;
- Information booths and information distribution at community events (Holiday parade, football games, drives), Foodland, Safeway, shopping plaza, and other public areas in ‘Ewa Beach;
- Local media publications including, but not limited to, radio, local news, and social media.

Our outreach will be nondiscriminatory without regard to race, color, ethnicity, national origin, religion, sex, sexual orientation, marital status, income level, academic or athletic ability, disability, need for special education services, or lack of proficiency in the English language. We also understand that children growing up in poverty within disadvantaged communities and neighborhoods often do not get the same educational opportunities or advantage that their more affluent peers have access to. Therefore, we will consciously recruit in neighborhoods that produce a high amount of children qualifying for free and reduced lunch so that we actively seek to serve children growing up from disadvantaged backgrounds.

Year Two (2018-19) - Following our first year, we will seek to backfill any seats in our initial 2017-18 100-student cohort by posting on our website in spring 2018 to advertise space availability for our rising 7th grade cohort.

For recruiting our new 100-student 6th grade cohort, we will follow an abridged version of our 2016-17 recruitment plan, with some small adjustments.

Component	Date	Actions
Fall Open House – Prospective Families	November 2017	Hold open house for prospective families to learn about DreamHouse, meet students, Leadership Support Team members, teachers (by choice, non-CBA time)
Spring Open House – Prospective	February 2017	Open house #2 with details for applying to lottery, lottery dates, next steps, timeline

Families		
Lottery	March 2018	Hold lottery for (1) incoming 6 th grade cohort of 100-students, (2) backfilling list for rising 7 th grade cohort with waiting list or additional lottery on the same day
Matriculation	Spring 2018	Matriculation process, open door policy to admitted students and families
Home Visits	Spring / Summer 2018	Visit admitted families, as well as families on the waiting list (if possible); early summer, roll out summer work for incoming 6 th grade cohort
Matriculation & Enrollment	Summer 2018	Families enroll and matriculation into 6 th grade, 2018-19 DreamHouse cohort; attend open house for new families; attend welcoming open house for 1 st and 2 nd year families and students

2. If applicable, the identification and description of any enrollment preferences that the proposed school would request that are in compliance with federal and state law and any Commission policies or guidelines, including a reasonable justification for the enrollment preference request.

Not applicable because the proposed school will not seek any enrollment preferences.

3. An admission and enrollment policy, provided as **Attachment Y (no page limit)**, that complies with applicable laws and any Commission policies or guidelines, ensures the proposed school will be open to all eligible students, and includes:
- a. A reasonable timeline and comprehensive plan for the application period, including admission and enrollment deadlines and procedures and an explanation of how the school will receive and process applications;
 - b. A reasonable timeline and comprehensive plan for student recruitment or engagement and enrollment;
 - c. Effective procedures for lotteries, waiting lists, withdrawals, re-enrollment, and transfers in accordance with state and Commission requirements; and
 - d. Descriptions of reasonable pre-admission activities for students and parents or guardians, including an explanation of the purpose of such activities.

An admission and enrollment policy is provided as **Attachment Y**.

E. Parent Involvement and Community Outreach

1. A clear description of the proposed school’s philosophy on parent and community involvement and the role of parents or guardians and the community in the proposed school, including a summary of what has been done to assess and build parent and community interest in the proposed school and the results achieved.

Parent Involvement | We define family engagement as the collaboration between families and educators that accelerates student learning. Supported by the National Education Agency, we see that students do better in school and in life when families and schools are equal partners in a child's education.

Community Outreach | DreamHouse defines collaborating with the community as coordinating resources and services for families, students, and the school with community groups, including businesses, agencies, cultural and civic organizations, and colleges or universities.

Progress | DreamHouse officially began engaging the community in late 2013. Community engagement includes joining neighborhood board meetings, engaging in one-on-one conversations with parents, students, educators, and community leaders, as well as holding monthly community meetings to provide space for community members and clarity around educational needs of the 'Ewa Beach community. These meetings have informed the vision and mission of our plan, as well as set the foundation for an active, engaged Community Council.

2. Sound parent engagement plans that are welcoming and accessible to all parents or guardians from the time that the proposed school is approved through opening and after the proposed school is opened, including plans for building family-school partnerships that strengthen support for learning and encourage parental involvement and any commitments or volunteer activities the proposed school will seek from or offer to parents or guardians.

Parent Engagement Plan | Lead by the Leadership Support Team, our parent engagement plan is grounded in a research-based framework, developed by Joyce Epstein of Johns Hopkins University, describing six types of involvement—parenting, communicating, volunteering, learning at home, decision making, and collaborating with the community.

Orientation - Engaging our families begins with a four month orientation and welcoming sequence that will a) orient our new students and families to DreamHouse, b) build relationships with students and families and empower all as agents for the founding culture and trajectory of the school, and c) set expectations and put students on a pathway to being ready for fall 2017 opening. As referred to in the Recruitment, Admission, and Enrollment plan, our plan will follow the following timeline:

April ('17) - Admitted family open house #1 to welcome / align families to DreamHouse

May, June ('17) - Home visits to deepen relationship and engage summer transition

July ('17) - Founding family open house to build community and set year's intentionality

School Space - We will build an open, welcoming environment to all students, families and community members (e.g. open door policy, AM/PM accessibility).

Relationships & Involvement - Our family-school partnership philosophy will follow these three pillars: (1) communication, (2) information / education, (3) partnership.

(1) Communication - Clear, timely communication with parents is important to encouraging involvement; we will maintain timely follow-up through e-mail, phone, and in-person communication so that parents and families are and feel prioritized;

(2) *Information & education* - DreamHouse will allow opportunities for parents to attend informational and educational sessions geared toward strengthening the school/home partnership and empowering families to support their student's educational success (e.g. data literacy nights, parent conferences, state of the school)

(3) *Partnership* - Maintaining an engaged Community Council, holding space and time for ILDP work, opening internal meetings to parents (e.g. strategic planning)

Volunteering - Our philosophy around volunteering is that programming and opportunities for engaging with the school in a volunteer and partnership fashion will strengthen relationships and empower families and give families agency in our school culture. We will seek parents for the Community Council, thought-partners on our operations, and parent leaders for events; we will offer opportunities to inform our school operations and direction, informational sessions, and access to community partnerships.

3. Effective strategies describing how the proposed school will inform and engage parents or guardians and the community about the proposed school's development.

Effective Communication Strategies | Our philosophy is that open communication builds relationships, fosters trust for a true feedback cycle, and leads to strengthening family-school partnerships. DreamHouse strives at all times to be transparent with families, encourages honest and open communication, and works to ensure families have the information they need to be true partners in their students' education.

Before School Opens (Aug. '16 - Jul. '17) - As part of our recruitment, admission, enrollment, and matriculation, we will: announce to families our charter approval via local and social media, commercial / shopping center presence, neighborhood canvassing, weekly talk story sessions, and monthly informational nights.

After School Opens (Aug '17+) - We will maintain clear, timely communication via phone, e-mail, flyer, and in-person methods; we welcome parents to join the Community Council and to visit DreamHouse (open door policy). Parent conferences, open house nights, feedback cycles (via survey and town hall style) will be initiated as well.

4. A description of any community resources and partnerships the proposed school has established with community organizations, businesses, or other educational institutions that will benefit students and parents or guardians, including the nature, purposes, terms, and scope of services of any partnerships and existing evidence of commitment and support from identified community partners, provided as **Attachment Z (no page limit)**, such as letters of intent or commitment, memoranda of understanding, and/or contracts.

Community Resources and Partnerships | Since 2013, DreamHouse has worked to deepen relationships and learn from the parents, students, community leaders, and organizations of 'Ewa Beach. A list of individuals and organizations that have been involved in discussions and partnership work are below, including an "exploratory bucket" that consist of non-'Ewa Beach and mainland individuals / organizations we feel could significantly benefit our students, families, and community.

Individuals - from one-on-one discussions to weekend roundtables, the purpose of these meetings was to talk story about existing educational opportunity; due to personal relationships and vision alignment, we anticipate continuing our work with the following individuals:

Principal Ed Oshiro (Ewa Makai Middle School); Sonia Lim (Iroquois Point Elementary); Principal Christopher Bonilla (Ilima Intermediate School); Principal John Lee (Campbell High School); Alisa Bender (Hawai'i State Department of Education); Christiane Bolosan-Yee (FOR'EWA PONO); John Clark ('Ewa Beach Neighborhood Board); Representative Matt LoPresti (Hawai'i State Legislature); Senator Will Espero (Hawai'i State Legislature); Kurt Favella (Lions Club); Lori Respicio (Hale Pono, 'Ewa Beach Boys & Girls Club)

Local Organizations - the following organizations have been consulted and briefed on the DreamHouse initiative; individuals and departments from each organization have expressed partnership interest and support for educational programming and organizational development.

University of Hawai'i at West O'ahu; University of Hawai'i at Mānoa; Running Start; GEAR UP Hawai'i; P-20; Early College High School Program; YMCA College Camp; University of; Hawai'i Outreach College; 'Iolani School; Kamehameha Schools; Partners In Development

Exploratory Buckets - we will prioritize bridging established personal relationships to institutional partnerships with the following organizations (i.e. we have strong connections with individuals at each of the following organizations; upon becoming a legal school entity, we will build strategic, collaborative partnerships):

Harvard Graduate School of Education; Harvard University Native American Program; Center For Public Leadership at the Harvard Kennedy School of Government; Native American Community Academy; College Horizons; New Leaders For New Schools; Unlocking Potential; Building Excellent Schools

Please refer to **Attachment Z** for letters of support relating to community resources and partnerships.

F. Nonprofit Involvement

1. If applicable, a clear and comprehensive description of the proposed school's associated nonprofit organization, including its current tax status and/or the plan and timeline for obtaining tax exempt status and the nonprofit's mission and purpose. The description must specifically identify ways that the proposed school's associated nonprofit organization will support the proposed school (such as community fundraising, developing partnerships, finding alternative funding sources, writing grants, and finding other ways to leverage existing resources) and specify any grants or programs that the nonprofit is planning to use. If the nonprofit's mission is not to solely support the proposed school, the description must also adequately explain any competing interests for the nonprofit's time and resources and how the proposed school will ensure such competing interests will not hinder the school's ability to operate and obtain outside supports.

Our nonprofit is independent of the proposed school and is in existence to support the school through fundraising (fundraising sources detailed in Financial Plan); the proposed school has no

fiduciary responsibility or contractual obligation to the nonprofit. Our non-profit is in good standing with state and federal law and regulations.

2. A list of all current and identified nonprofit board members that is in compliance with the State Ethics Code and their intended roles and a description demonstrating that the nonprofit board members have the necessary experience and qualifications relevant to the above means of supporting the proposed school. If none of the current nonprofit board members have the requisite experience or capacity, the description must explain a comprehensive plan to identify and recruit individuals with the necessary experience and capacity.

Zach DiIonno; Chair

Currently an attorney in Honolulu, Zach has extensive experience in local legal proceedings, legislative activities, and has previously clerked at the Hawai'i Supreme Court. He is a graduate of the Richardson School of Law at the University of Hawai'i at Mānoa.

Meilan Akaka; Vice Chair

Meilan sits on multiple nonprofit boards in Hawai'i and is actively involved in political and leadership spaces in Hawai'i (she is the niece of former US Senator Daniel Akaka). Meilan is a graduate of Punahou School and is deeply committed to expanding educational opportunity for children in the Hawaiian Islands.

Jacob Karasik; Treasurer & Secretary

Jacob has teaching, nonprofit, and fundraising experience; his grant-writing abilities will help support our fundraising efforts.

Lissette Roman; Community Member

Lissette is a parent and resident of 'Ewa Beach, deeply connected to local education and community initiatives within her own community; she brings fundraising operations and event management skills to the board.

Additional community, business, political, and cultural leaders have been identified and engaged in joining the DreamHouse, Inc. board in order to bring their experiences, qualifications, and networks in support of the proposed school. Their names have been redacted and will be withheld until the Commission renders a decision. Immediately upon that decision, and if in the affirmative, these members will be confirmed and on-boarded to the DreamHouse, Inc. board in line with protocols and policies outlined in the organization's bylaws.

G. Geographic Location and Facilities

1. Geographic Location.

- a. A description, with reasonable specificity, of the geographic location of the proposed school's facility, including the DOE complex area(s) in which the proposed school will be located.

'Ewa Beach is the proposed location for this school's facility (Campbell-Kapolei).

- b. A reasonable rationale for selecting the geographic location and a comprehensive description of the research conducted, if any, to support that rationale.

Rationale: As explained in the School Overview and highlighted in **Attachment B** data, ‘Ewa Beach has a) a strong need for additional capacity, especially at the secondary level; b) a need for a local school with a local governing board; c) a need for additional options for middle and high school; and d) a need for a 6-12, contiguous educational program.

Sources of supporting data include, but are not limited to: the State of Hawai‘i Department of Education (HIDOE) Accountability Resource Center Hawai‘i (ARCH); School Status and Improvement Reports (SSIR); STRIVE HI Annual Report and School Profiles; HIDOE Enrollment Spreadsheets; HIDOE Annual Report; Complex Area Report: Campbell-Kapolei; 2013 U.S. Census; housing development reports; and Star Advertiser media coverage. In addition to quantitative rationale, our applicant team has deep personal experience and commitment within and to the Complex as demonstrated in our Board Member Information Forms (**Attachment U**).

2. Facilities.

- a.** If the proposed school has not obtained a facility, a comprehensive, reasonable, and sound plan and timeline for identifying, securing, renovating, and financing a facility—including identification any brokers or consultants the applicant is employing—that will be in compliance with applicable building codes and meet the requirements of the Academic Plan, including the needs of the anticipated student population. The plan must briefly describe possible facilities within the geographic area in Criterion III.G.1, including addresses, square footage, square footage rent, amenities, previous use, and a general assessment of what needs to be done to bring each possible facility into compliance. If the proposed school has a *virtual* or *blended learning program*, or relies heavily on technology, the description must adequately explain how each possible facility will support the proposed technology model, including electrical capacity and access to sufficient network capacity. The description must reference and provide, as **Attachment AA (no page limit)**, a letter of intent, Memorandum of Understanding (“MOU”), or other proof of intent to secure a specific facility.

Facilities | Aligned with our philosophy, our vision is to have a school that is in direct proximity to the children, families, and community of ‘Ewa Beach; broadly, these are the neighborhoods south of Papipi Rd. / Hanakahi St. / Hanaloa St. and between ‘Ewa Beach Park and Oneula Beach Park. Please refer to **Attachment AA** for proof of intent to secure a specific facility. We seek an integrated, diverse student body of children growing up from this area, with a special emphasis on the children and families that do not have access to the new educational facilities built just north on Ft. Weaver Rd (i.e. Ewa Makai, Keone‘ula). As such, we are envisioning the following three phases to support our growth plan:

PHASE	ACADEMIC YEAR	CAPACITY	PHASE PURPOSE
<i>Pre</i>	2016-17	0	<i>Acquire, renovate, and prepare facility;</i>
I	2017-18	100	Open school in facility while adding space via portables, temporary structures, and credit;
II	2018-19,	200, 300	Sustain growth from 100 to 300 students with

	2019-20		temporary options, while also acquiring the property for, building / renovating on, and creating a long-term facility
III	2020+	400+	6,7,8,9 grades move into new, long-term facility beginning fall 2020.

Facilities Strategy & Timeline | Short-term

Short-term, our goal is to identify a building and associated property that can house up to 300 students. This will give us space to build our middle school (6,7,8) through the academic years 2017-18, 2018-19, 2019-20, at which point we would move into a larger facility and grow to our terminal capacity (700 students by 2023-24).

Following the rhythm of (1) identifying and securing, (2) financing, and (3) renovating/building, we will focus on the following three buckets in order to acquire and make ready a facility by July 2017 (school open, 100 students, 6th grade):

1. *Network Activation.* Multiple members of our applicant team have relationships across various networks on O‘ahu including developers, land holders, community leaders, organization leaders, and state officials; we have been increasing communication and mobilizing these individuals with the headline that we need a facility in order to become a school. Supporters of this project and colleagues are assisting us in finding land, options, and conversations that have proved promising; we will continue to activate these networks and amplify our search efforts for an ‘Ewa Beach facility.
2. *Building Research.* Our due diligence of existing buildings and educational facilities in ‘Ewa Beach is our second strategy, which mainly consists of DOE facilities, local and municipal facilities, existing organizations, various churches, portables, and other miscellaneous facilities. This strategy is primarily focused on existing facilities and options that may require renovation, permitting, and/or rezoning. A list and profile of these options is below in the *Facilities Options* section.
3. *Financing & Fundraising.* Our financing strategy focuses on four primary buckets: (1) philanthropic investors, (2) local financial institutions, (3) mainland philanthropic dollars, and (4) mainland support organizations (i.e. organizations that help finance fledgling schools). Our communication, applications, and partnership structures are being actively explored as of February 2016.

Our short-term timeline is as follows:

2016				2017	
Q1	Q2	Q3	Q4	Q1	Q2
<i>Identifying & Securing Facility</i>					
<i>Establish Funding Pathways</i>		<i>Funding</i>			
		<i>Renovation</i>			

					<i>Facility Prep</i>
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1. *Identifying & Securing Facility* - up until a Commission decision is rendered, we will work closely with our networks and building options in ‘Ewa Beach to establish partnerships and a “good faith” memorandum of understanding (MOU); this work will take place up until August 2016, at which time a decision is expected.
2. *Establishing Funding Pathways* - similar to our work with networks and facilities owners and managers, we will build partnerships, submit applications, and secure funding commitments contingent on the Commission’s decision; this work will take place up until August, 2016, at which time a decision is expected.
3. *Receiving Funding* - upon the Commission’s decision, and if affirmative, funds will be released to our 501(c)(3) organization for immediate use.
4. *Renovation Period* - alongside of identifying and securing a facility, we will engage potential building and construction (renovation-focused) companies to offer estimates and timelines around renovation and getting facility permitted and up to code. Renovation would begin once Commission decision is rendered (if affirmative) and funds are released; target early Q3, 2016.
5. *Final Facility Prep* - we would then take the final quarter of our preparation period (Q2, 2017, Apr-Jun) to prepare the facility for students and learning; this will require 3-4 months, putting us in a place for July / August 2017 open to teachers and students.

Facilities Strategy & Timeline | Long-term

Building from our short-term vision of acquiring a facility to support us to our middle school capacity by 2019-20 (300 students, 6-8 grade), we would then move into a larger facility that would support our growth to terminal capacity by year 2023-24 (700 students, 6-12 grade).

2016	2017	2018	2019	2020
Short-term strategy & open		Identify, finance, begin	Build	Open

(1) Short-term Strategy & Open (Q1, 2016 - Q2, 2017 / 18 mo.) - detailed above, our short-term strategy is to acquire a facility that serves our target population and has capacity for approximately 300 students.

(2) Identify, Finance, Break Ground [Identify & Finance (Q1, 2018 - Q3, 2018 / 9 mo.); Break Ground (Q4, 2018)] - we will intensify and progress our search process for a new, longer-term facility in the early part of 2018; this would be a building that could house our school at terminal capacity, which is 700 students by the 2023-2024 school year. We project a 9-month window to identify and align a space to either build or renovate; aligned to our financial strategy, we will have been fundraising and financing up to and through this period.

Identify | Central to our growth plan in ‘Ewa Beach, from 100 to 700 students over the course of seven academic years, a larger facility that can adequately house our students, faculty, and programming will be needed as we gradually grow. The facilities landscape in Hawai‘i is somewhat barren, and ‘Ewa Beach is no exception. The following long-term strategies are on the table:

- *University of Hawai‘i at West O‘ahu (UHWO)* - currently owns hundreds of acres of land and has expressed openness to a partnership as recently as July 2015.

- *DOE land* - large parcels of undeveloped land on ‘Ewa Beach Elementary, Pohakea Elementary, Ilima Intermediate, and Campbell High School campuses.
- *Parcels owned by City & County of Honolulu* - multiple parcels of land in ‘Ewa Beach that are owned by the City & County; primarily, the 13 acre ‘Ewa Beach Community Park, including the two-story community center.
- *Developers (Haseko, Gentry, DR Horton)* - our team has been in conversation with multiple representatives from local developers in ‘Ewa and ‘Ewa Beach;
- *Open land parcels* - there exist parcels of land on Pohakupuna Road that have either 1-2 old buildings on them, or no structures at all;

Financing | We will use a syndicate of state and federal revenue sources, philanthropic funds, and capital from financial institutions and charter school support companies to finance the purchase of land, development, and building (renovation) of a school. Our financing and fundraising strategies for the short, near, and long-term are detailed in the financial plan.

Break Ground | Our vision is to break ground for a new facility during the 2018 calendar year, allowing developers up to 18 months to build (renovate) a 700-student facility on lands acquired in ‘Ewa Beach.

(3) Build (Q4, 2018 - Q2, 2020 / appx. 18 mo.) - we project an 18-month construction and/or renovation phase to build a longer term facility to house our terminal capacity school; square footage, footprint, building model to be determined by land parcel, funding, and opportunity within ‘Ewa Beach. We will work closely with architects, developers, and builders to design a conservative, feasible facility for long-term use.

(4) Open (Q3, 2020 / July 2020) - open new building to 400 students at the beginning of the 2020-21 school year and grow each year into the 2023-24 terminal year with 700 students.

Facilities Brokers / Consultants

DreamHouse has engaged the Charter School Development Corporation (CSDC), a charter school facilities partner that specializes in real estate transactions, financing, development, and purchase in support of charter schools across the country.

- b.** If the proposed school plans to add students or grade levels during the first five years, a reasonable and sound facility growth plan that shows how the school will accommodate the additional square footage necessary for additional students, faculty, and staff and sufficiently identifies any permits or rezoning that might be necessary to implement the facility growth plan.

Please see Part A for a detailed facility growth plan.

H. Start-Up Period

- 1.** A comprehensive, reasonable, and sound management plan for the start-up period, provided as **Attachment BB (no page limit)**, that aligns with the Academic, Organizational, and Financial Plans (including the start-up year (Year 0) budget in the Financial Plan Workbook). The management plan must detail the start-up plan for the proposed school, including specific tasks, timelines, milestones, and responsible individuals for each of the following areas:

- a. Plans to obtain financing for the proposed school’s facility, highlighting the alignment of the financing plan with the timing of obtaining and renovating the facility, as described in [Criterion III.G.2](#);
- b. Plans to fund the start-up period, including all plans for fundraising and grant writing and a description of any specific fundraising opportunities and grants the applicant has identified;
- c. Plans to market the proposed school to the school’s anticipated student population and develop partnerships with other charter schools, DOE schools, and private schools to identify possible students and achieve the proposed school’s projected enrollment, including any other ways the applicant plans to achieve its projected enrollment;
- d. Plans to hire teachers, administrative staff, and support staff during the start-up period, if any, incorporating the timelines for hiring teachers, described in [Criteria II.E.4](#), and delivering the professional development, described in [Criteria II.E.2](#);
- e. Plans to identify, recruit, select, and add or replace new governing board members that align with the recruitment plan described in [Criterion III.A.5.d](#), the governing board transition plan described in [Criterion III.A.5.e](#), and any governing board training described in [Criterion III.A.8](#), as applicable; and
- f. Any other plans for activities that will need to be completed during the start-up period, such as the selection of curriculum materials, as applicable.

A management plan for the start-up period is provided as **Attachment BB**.

- 2. A sound plan for leading the development of the school during its pre-opening phase, including identification of capable individuals who will work on a full-time or nearly full-time basis following approval of the application to lead development and implementation of the plan to open the proposed school and a description of a viable plan to obtain the funding necessary to compensate these individuals that is aligned with the budget.

Please refer to **Attachment BB** for our development of the school during pre-opening phase.

I. Conversion Charter School Additional Organizational Information

This section is not applicable. The proposed school is not a conversion charter school.

IV. Financial Plan

A. Financial Oversight and Management

1. A clear description that gives reasonable assurance that the proposed school will have sound systems, policies, and processes for financial planning, accounting, purchasing, and payroll, including an adequate explanation of how the proposed school will establish and maintain strong internal controls and ensure compliance with all financial reporting requirements. The description must also explain the plans and procedures for conducting an annual audit of the financial and administrative operations of the proposed school that is in accordance with state law, including a reasonable annual cost estimate of the audit that is included in the Financial Plan Workbook.

Strategy Components | DreamHouse will implement and maintain a timely, transparent financial management strategy in accordance with state and federal law and in support of our school's vision, mission, and growth plan. The following principles will guide our financial management and oversight strategy: (1) sound internal fiscal controls, (2) an annual audit, and (3) active financial modeling and projections.

(1) Sound Internal Fiscal Controls - DreamHouse 'Ewa Beach will be a fiscally independent, direct-funded charter school. The School Board will take seriously its fiduciary responsibility to oversee the management of public money. As such, a system of internal fiscal controls will be instituted. Among these will be policies for cash handling and check writing, sound bookkeeping and accounting practices, and conservative financial planning and budget forecasting. We will build up and maintain a cash reserve of a to-be-determined percent of expenditures, aligned to Commission guidelines, to protect against cash flow fluctuations. On-site management of DreamHouse 's finances is the responsibility of the School Director and Operations Manager. In addition, the School Board Chair, School Board, School Board Finance Committee, and Nonprofit Board Chair and Board will engage with budget strategy and oversight to strengthen the amount of touch points and oversight on our financial health. Our budgeting system for financial accounting and purchasing will be based off of the chart of accounts methods used by Georgia Perimeter College which embeds codes associated with fund group, department ID, program code, class code, project ID, and account code for every transaction; this will allow us to zoom in and out of cost groups and individual transactions.

(2) Annual Audit - The Finance Committee of the DreamHouse School Board will annually oversee the selection of an independent auditor to inspect the school's accounting and reporting records. A CPA with experience with charter school audits will lead the independent audit. The audit will be conducted in accordance with Charter Commission and state guidelines and Generally Accepted Accounting Principles applicable to the school. The audit will verify the accuracy of DreamHouse's financial statements (including balance sheets, income statements, and cash flow statements), attendance and enrollment accounting practices, review the school's internal controls, and any other documents or systems required by law.

At the conclusion of the audit, the Finance Committee with the School Director, Operations Manager, will review any exceptions or deficiencies and, if applicable, additional DreamHouse contracted service providers (financial, human resource, additional contracted third parties). The

Finance Committee will report the findings and recommendations to the full School Board who will submit a report to the Commission including DreamHouse's plan for resolving in a timely manner exceptions or deficiencies. The final audit report will be completed and shall be submitted to the Commission by required date. Any disputes regarding the resolution of audit exceptions and deficiencies will be referred to the dispute resolution process referenced in the petition, or if applicable, referred to appropriate state agencies. The independent fiscal audit of the charter school is public record. DreamHouse will promptly and satisfactorily respond to all reasonable inquiries from the Commission and state. The applicant governing board has identified CW Associates as a viable CPA option. A price of \$10,000 per year was quoted and has been built into the annual budget.

(3) Active Financial Modeling and Projections - The DreamHouse School Director, Operations Manager, School Board Chair and Nonprofit Board Chair will engage frequently in actively modeling financial projections given cash flow timing, fundraising operations, expenses, unforeseen events, enrollment projections and variability, and contingency funding. Sound modeling will exist on weekly, monthly, quarterly, and annual meetings between these parties and will support strategic decision-making and growth sustainability.

2. A clear description of the roles and responsibilities that demonstrates a strong understanding of the appropriate delineation of such roles and responsibilities among the proposed school leadership team or management team and proposed school governing board regarding school financial oversight and management.

Roles and Responsibilities | the following individuals/groups will be responsible for financial oversight and management: School Director, Operations Manager, School Board Chair, School Board, School Board Finance Committee, Nonprofit Board Chair, Nonprofit Board. The strategy for oversight and management will land in four buckets: (1) active management and oversight, (2) strategic review and planning, (3) overview and approval, and (4) auditing and control.

(1) Active Management and Oversight - The budget, finances, and day-to-day operations and strategy execution will be overseen by the Operations Manager and School Director. The Operations Manager will be the primary lead for all cash and check handling, budget updating, reimbursements and expense tracking, bookkeeping and accounting, and other daily/weekly financial duties. The School Director will support the Operations Manager in these duties, while highlighting potential hot spots and making near-term strategic decisions with regard to finances and resource allocation.

(2) Strategic Review and Planning - On a bi-weekly to monthly basis, the School Director will engage the School Board Chair and the Nonprofit Board Chair in a strategic review and update of current expenditures, projections, and financial health. The School Board Chair will engage the Finance Committee for review and support, while the Nonprofit Board Chair will engage the Nonprofit in aligned fundraising and financial support needed given the strategy and circumstances of the budget. Each Board Chair, along with the School Director, will collaborate in forecasting and planning for both Nonprofit support and school budget needs.

(3) *Overview and Approval* - The School Board Chair, with the support of the School Director and Finance Committee, will engage the overall School Board in review, feedback, and approval of budget and financial-related matters. The Nonprofit Board Chair will engage the Nonprofit Board in approving fundraising and financial support amounts and strategy, while also collaborating with the School Board.

(4) *Auditing and Control* - Lastly, the School Board (led by the Finance Committee) will support and engage with the independent auditor for all auditing and control purposes. The School Director and Operations Manager will provide support throughout this process.

3. A description of sound criteria and procedures for selecting vendors or contractors for any administrative services, such as business services, payroll, and auditing services, including reasonable anticipated costs that are reflected in the Financial Plan Workbook.

Vendors or Contractors | Along with direct support from the School Director and Operations Manager, the School Board Chair and Finance Committee will solicit and engage appropriate vendors and contractors for a variety of services. Selecting vendors and contractors will adhere to Advisory Opinion No. 2015-2 issued by the Hawai'i State Ethics Commission on August 19th, 2015, among other conflict of interest-related guidelines from the Commission and state.

Our procedures for soliciting and engaging vendors and contractors will adhere to the following guidelines:

1. DreamHouse personnel identifies potential vendor or contractor to assist DreamHouse with needed services;
2. Operations Manager and School Director perform due diligence on third party including, but not limited to, screening for conflict-of-interest-related issues (relationships with school staff, board, or Nonprofit board), need/service alignment, financial prudence, and viability of partnership;
3. If after engaging third party there is alignment and partnership is financially and operationally reasonable/feasible, School Director engages School Board Chair and Finance Committee to review and render decision;
4. If affirmative, School Director consults with Nonprofit Board Chair (if reasonable) to update financial transaction and impact on budget;
5. Operations Manager and School Director engages third party and contract is executed;
6. Contract execution components in chronological order: (1) purchase requisition, (2) purchase order, (3) invoice, (4) bill, (5) voucher, (6) check / payment, (7) receipt
7. Operations Manager and School Director monitor and report on third party to School Board and make adjustments as needed;
8. Prior to terminating and significantly altering vendor contract, School Director consults with Board Chair and Finance Committee.

An overview of potential services provided by various vendors and anticipated annual costs are listed in the budget (approximately \$93,500 during Year 0 and \$166,500 during Year 1).

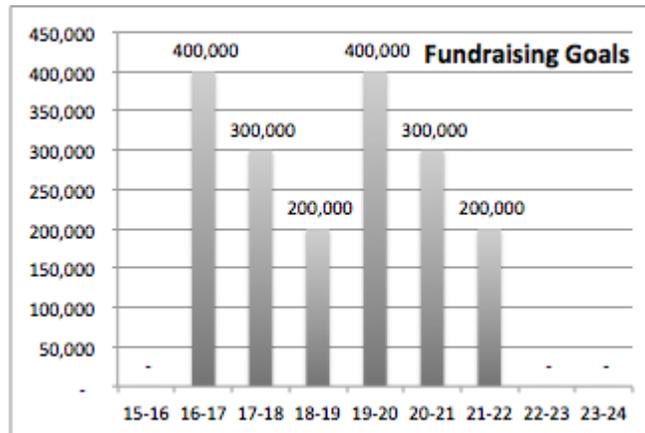
B. Operating Budget

1. Complete, realistic, and viable start-up and three-year operating budgets, provided through the Financial Plan Workbook ([Exhibit 6](#)) as **Attachment FF (required form)**, that align to the Academic and Organizational Plans.

The start-up and three-year operating budgets are provided as **Attachment FF**.

2. **Budget Narrative.** A detailed budget narrative that clearly explains reasonable, well-supported cost assumptions and revenue estimates, including but not limited to the basis for revenue projections, staffing levels, and costs. The narrative must specifically address the degree to which the school budget will rely on variable income (especially for grants, donations, and fundraising) and must include the following:
 - a. A description indicating the amount and sources of funds, property, or other resources expected to be available not only via per-pupil funding but also through corporations, foundations, grants, donations, and any other potential funding sources. The description must note which are secured and which are anticipated; explain evidence of commitment, and provide such evidence as **Attachment GG (no page limit)**, for any funds on which the proposed school’s core operation depends (*e.g.*, grant award letters, MOUs); and describe any restrictions on any of the aforementioned funds.

Aligned with our growth plan and anticipated state and federal resources, we have designed a pair of \$1 million fundraising campaigns that run from 2016-18, and 2019-21. Each fundraising strategy has a cascading structure, which paints an exit strategy for philanthropic investors; we see our partners as initiative funders, not endowments (see below). Please see **Attachment GG** regarding anticipated funding sources and restrictions on these funders. Our terminal year model is sustainable on per pupil funding alone, but we need support getting past initial cash flow challenges given the current charter landscape and lack of start-up funding mechanisms.



Revenue - DreamHouse revenue is projected from the following streams: State Sources, Federal Sources, and Fundraising. The breakdown is as follows:

State Sources (using \$6,500 per pupil)

Year (Students)	Year 0 (0)	Year 1 (100)	Year 2 (200)	Year 3 (300)
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Anticipated State Funding	\$0	\$650,000	\$1,300,000	\$1,950,000
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Federal Sources - Primarily Title I dollars in the form of reimbursements for children qualifying for Free or Reduced Lunch (FRL). Based off of local feeder elementary school demographics, we anticipate 50%+ FRL, and have used the \$463 figure provided by the DOE for Per Pupil Allocation. Title II funds are not factored in to this budget as staffing qualifications and teacher certifications are still to be determined.

Year (Students)	Year 0 (0)	Year 1 (100)	Year 2 (200)	Year 3 (300)
Anticipated Federal Funding	\$0	\$42,753	\$85,505	\$133,117

Fundraising - We have broken our fundraising into four major buckets: (1) local philanthropy (Hawai'i-based foundations), (2) national philanthropy (mainland, education-focused foundations with ties to Hawai'i), (3) local financial institutions (our islands' banks), and (4) additional funding vehicles (unique funding opportunities connected to our board). Investments will be made primarily to our associated 501(c)(3) Nonprofit, DreamHouse, Inc. An overview is below, however, please see the "Fundraising Pipeline Years 0 - 3" tab in our worksheet for additional detail.

Please note, with the "Fundraising Pipeline Years 0 - 3" tab in the budget worksheet, there are the following components: year, ask amount, anticipated total, total, grand total, and probability. Probability is a risk-weight of actually receiving funds; this creates a weighted pipeline and does not assume each ask is guaranteed. The following weighting guidelines are applied:

- 0-24% - Little to no connection, alignment to education, funding in Hawai'i
- 25-49% - Connection to organization, alignment to education, alignment to community
- 50-74% - Reasonable indication of funding interest
- 75%+ - Strong funding interest and some level of commitment, MOU, etc.

Fundraising Matrix

<i>(In Dollars)</i>	Year 0	Year 1	Year 2	Year 3	TOTAL
Local Philanthropy	107,500	170,000	163,750	220,000	661,250
National Philanthropy	50,000	40,000	20,000	40,000	150,000
Local Financial Institutions	150,000	-	-	-	150,000
Additional	100,000	112,500	52,500	150,000	415,000

Funding Vehicles					
TOTAL	407,500	322,500	236,250	410,000	1,376,250

- b.** A sound contingency plan to meet financial needs if anticipated revenues are not received or are lower than estimated, including contingencies for scenarios where the official enrollment of the proposed school is substantially lower than projected and/or anticipated variable income is not received. The contingency plan must also include a Year 1 cash flow contingency, in the event that revenue projections are not met in advance of opening.

Contingency Levels - Years 0-3, the overall budget relies on philanthropic dollars and additional sources of revenue outside of state and federal funding. Our models show sustainability at 300 students and at 700 students, our terminal middle school year (2020) and our terminal high school year (2024). The breakdown is as follows:

Total Funding Matrix (Where is DreamHouse Money Coming From?)

<i>(In Dollars)</i>	Year 0 (16-17)	Year 1 (17-18)	Year 2 (18-19)	Year 3 (19-20)
State & Federal Funds	-	692,753	1,385,505	2,083,117
Philanthropy & Other Sources	407,500	322,500	236,250	410,000
Budget/Expenses	372,000	910,500	1,432,100	1,943,578
% Budget Covered by State & Federal Funds	0%	76%	97%	107%
Philanthropy & Other Sources Needed	372,000 (100%)	217,747 (24%)	46,595 (3%)	-

**Please Note: our fundraising and additional sources campaigns will also build in growing retained earnings for cash reserve, as detailed in the budget worksheet.*

Our contingency plan has three main levers: (1) local financial institution, (2) Charter School Development Corporation, and (3) a private bridge loan and/or pledge.

1. *Local Financial Institution* - our team will explore and obtain a revolving credit facility of \$250,000 - \$500,000 with a local financial institution prior to the 2017-18 school year to offer cash drawdown ability in the instance that cash flow timing and/or enrollment variability impacts our projected budget.

2. *Charter School Development Corporation (CSDC)* - CSDC works with charter schools in new and growth phases to support with liquidity and cash flow challenges. In the case that we need to secure temporary funds to meet cash flow needs, we will leverage our partnership with CSDC and explore funding options.
3. *Private Bridge Loan / Pledge* - our third option is to seek the private support or co-borrower support of someone within our network.
4. *Insolvency / Unrealistic Projections* - in the case that all three contingency plans do not materialize, we cannot achieve a sustainable student base to serve, and funding sources from state, federal, and additional streams are incongruent with cash needs and growth, our board will engage the Charter Commission and state in conversations around model viability and sustainability.

Please see the “Contingency Model” tab in the budget worksheet to see the impact of enrollment variance. In Year One, we will rely heavily on philanthropic and additional sources, and potentially credit facilities in the instance that our enrollment numbers do not initially materialize.

- c. If the proposed school has a *virtual or blended learning program*, a clear and comprehensive description of the necessary costs for delivery of such program, including costs associated with hardware, software, peripheral needs (cases, headphones, chargers, etc.), storage, and network infrastructure needs, as applicable.

This does not apply as the school does plan to have a virtual or blended learning program.

V. Applicant Capacity

A. Academic Plan Capacity

1. Evidence that the key members of the proposed school's academic team have the collective qualifications and capacity (which may include, but is not limited to, documented and relevant credentials and experience reflected in the resumes of all members and an understanding, as demonstrated by the application responses, of challenges, issues, and requirements associated with running a *high-quality charter school*) to implement the school's Academic Plan successfully. The evidence must include a description that:
 - a. Clearly identifies the key members of the applicant's academic team that will play a substantial role in the successful implementation of the Academic Plan, including current or proposed governing board members, school leadership or management, and any essential partners who will play an important ongoing role in the proposed school's development and operation; and
 - b. Describes the academic team's individual and collective qualifications for implementing the proposed school's Academic Plan successfully, including sufficient capacity in areas such as school leadership, administration, and governance; curriculum, instruction, and assessment; performance management; and parent or guardian and community engagement.

Dr. Deborah Zuercher - Professor, Fulbright Scholar, and international program administrator at the College of Education at University of Hawai'i; Lives in Makaha, works at UH Mānoa, and has supported cohorts of 'Ewa Beach teachers in the UH MEdT program since 2008; has coached and supported dozens of teachers within middle and high schools in the Complex;

Jane Henzerling - Charter school founder and director, Johns Hopkins Education Policy Fellow, and former Executive Director of Teach For America Miami-Dade; Served as thought-partner to Alex since 2013 regarding school development work, has visited multiple 'Ewa Beach schools, and serves a population with similar background and learning characteristics;

Meilan Akaka - Former Campbell High School special education department head, former Punahou summer program (PUEO) administrator and Instructional Coach, new teacher coach on the Leeward Coast, and current board member at local foundation; Taught at Campbell, promoted to Department Head at Campbell, and has supported teachers in the Leeward District for over three years;

Lissette Roman - Former charter school leadership fellow and math department head, Leeward Coast teacher, and teacher leadership fellow in Hawai'i. Lives in 'Ewa Beach and sends two of her children to 'Ewa Beach public schools; committed to increasing options for her own children and local parents and families;

Alex Teece - School Leadership master's candidate at the Harvard Graduate School of Education, summer school principal, and former Ilima Intermediate team lead; Taught at Ilima, served as 7th grade team lead at Ilima, and has worked closely with former students, parents, educators, and organizations, and community leaders in 'Ewa Beach since 2013 to form this vision, application, and school plan;

Ed Kaukani - Experience within Campbell Complex; Born and raised in 'Ewa Beach, lives in 'Ewa Beach, went to Ilima and Campbell; committed to improving the educational experience of his community;

Zach DiIonno - Former Special Education teacher, UH Mānoa College of Education graduate; Served as licensed special education teacher at Ilima Intermediate for three years;

Jacob Karasik - Former lead teacher on the Navajo reservation; Worked for two years supporting Leeward District teachers plug into leadership development and community opportunities;

2. A description of the academic team's clear ties to and/or knowledge of the community in the geographic area where the facility is or will be and/or areas where the anticipated student population will come from.

Of the eight members of our applicant team, five have school administration, leadership development, and coaching experience within district and charter schools in Hawai'i and within successful mainland models; each has participated in administration leadership development and has experienced first-hand and real-time the challenges and requirements associated with running a high-quality charter school. Seven of the eight have experience in curriculum, instruction, and assessment as classroom teachers, grade and team level leaders, school leaders, and in Dr. Zuercher's case, managing multiple teacher training programs. Multiple members have served or currently serve on School Boards and committees and are familiar with the nuances and challenges of academic performance management, both locally and nationally. There are multiple parents and residents of 'Ewa Beach on the school and nonprofit boards.

3. A description that identifies any organizations, agencies, or consultants that are essential partners to the successful planning and establishing of the proposed school and/or implementation of the Academic Plan; explains the current and planned roles of such essential partners and any resources they have contributed or plan to contribute to the proposed school's development; and includes evidence of support, provided as **Attachment HH (no page limit)** (such as letters of intent or commitment, memoranda of understanding, and/or contracts), from such essential partners demonstrating these partners are committed to an ongoing role with the proposed school, if applicable.

Essential Partners - Curriculum Research & Development Group (CRDG); The Janus Group; The University of Hawai'i at Mānoa; The University of Hawai'i at West O'ahu; The Polynesian Voyaging Society (PVS). Please see **Attachment HH** for evidence of support.

4. School Director.

If the school director is known, a description that:

- a. Identifies the school director;
- b. Summarizes the school director's academic and organizational leadership record and includes this individual's resume, provided as **Attachment II (no page limit)**;
- c. Discusses and demonstrates evidence of the proposed school director's experience in and ability to design, launch, and lead the proposed school in achieving its mission and

effectively serving the anticipated student population, as well as evidence that the proposed school director is well qualified to implement the Academic Plan.

- d. Describes a thorough recruiting and selection process for selecting the school director, including the rigorous criteria used for screening and selecting candidates based on experience and ability to design, launch, and lead a *high-quality charter school*.

School Director - The proposed School Director is Alex Teece. Alex served as a 7th grade ELA teacher in 'Ewa Beach and was elected to the 7th grade leadership team after his first year. He was also invited to a leadership cadre formed by Ed Oshiro to help craft the vision, mission, hiring policies, and even the mascot for Ewa Makai. He graduated from the University of Hawai'i at Mānoa's College of Education with a Master of Education in Teaching while also completing a final thesis on student identity in the 'Ewa Beach community. Alex went on pursue his Master of Business Administration, return to Hawai'i to work in Nonprofit as well as local banking, and is currently in the School Leadership Program at the Harvard Graduate School of Education on full scholarship from a leadership program out of the Harvard Kennedy School of Government. Alex's resume is attached as **Attachment II**.

Beyond Alex's teaching and leadership experience at Ilima Intermediate, he was the designer and leader of a summer school program during which he led a team of six responsible for coaching 36 new teachers and educating 130 students. He has played a central role in the design and collaboration for the proposed school and has grounded the mission of this school in his, his former students, parents, families, and community members' educational experiences within the community. He currently serves as a principal intern as part of his graduate program where he works coaching individual teachers, helping design professional development and support systems, and conducting a comprehensive community engagement project.

Alex was selected as founding School Director by the applicant team due to his centrality, commitment to, and vision for the proposed school. He has helped lead this initiative from inception, and the applicant governing board was looking for someone who had teaching experience in 'Ewa Beach, Hawai'i context, business and academic education and experience, and a deep commitment to the children, families, and community of 'Ewa Beach. He did not need to be recruited and the applicant governing board has endorsed his consideration unanimously. The main criteria for his selection was determined by the need for someone with the competencies, passion, and commitment to the application and plan that has been written for DreamHouse; Alex has demonstrated these abilities, pursued education and leadership development where needed, and the applicant governing board believes he is the right person to serve as founding director of this school. If for some reason the proposed school needs a contingency plan, a School Director job description exists with **Attachment LL**.

5. Management Team. A description of the positions that will make up the proposed school's leadership or management team beyond the school director, if any, including appropriate responsibilities and qualifications for such positions. The description must:

- a. If not known, provide sound job descriptions or qualifications and criteria that will be used to select these positions, as **Attachment LL (no page limit)**, as well as describe a

sound timeline, recruiting, and selection process for recruiting and hiring these individuals.

Management Team - The core leadership/management team for DreamHouse is the “Leadership Support Team”, which is comprised of the following members: Instructional Coach/Lead, Special Education Lead, and Operations Manager. Additional members with leadership responsibility will be hired as the school grows, however the core leadership team is the School Director and these three individuals. Please see **Attachment LL** for job descriptions, qualifications, and criteria.

An affirmative decision rendered by the Commission will commence the recruiting, selection, hiring, and development of the Leadership Support Team. A detailed timeline and plan exists as **Attachment BB - Start-up Project Management Plan**.

B. Organizational Plan Capacity

1. Evidence that the key members of the proposed school’s organization team have the collective qualifications and capacity (which may include, but is not limited to, documented and relevant credentials and experience reflected in the resumes of all members and an understanding, as demonstrated by the application responses, of challenges, issues, and requirements associated with running a *high-quality charter school*) to implement the school’s Organizational Plan successfully. The evidence must include a description that:
 - a. Clearly identifies the key members of the applicant’s organization team that will play a substantial role in the successful implementation of the Organizational Plan, including current or proposed governing board members, school leadership or management, and any essential partners who will play an important ongoing role in the Organizational Plan; and
 - b. Describes the organization team’s individual and collective qualifications for implementing the proposed school’s Organizational Plan successfully, including sufficient capacity in areas such as staffing, professional development, performance management, general operations, facilities acquisition, development (such as build-out or renovations), and management.

Organizational Capacity - Competencies and experience of our founding team:

- **Dr. Deborah Zuercher** - Professor, Fulbright Scholar, and international program administrator at the College of Education at University of Hawai‘i;
- **Jane Henzerling** - Charter school founder and director, Johns Hopkins Education Policy Fellow, and former Executive Director of Teach For America Miami-Dade;
- **Alex Teece** - current board president of local Nonprofit, experience in hiring, designing and delivering professional development within educational settings locally and on the mainland, and has previous experience as operations director and team lead;
- **Zach DiIunno** - current law attorney at Alston Hunt Floyd & Ing, Richardson Law School graduate, former teacher at Ilima Intermediate;
- **Lissette Roman** - former charter school leadership fellow and math department head, Leeward Coast teacher, and teacher leadership fellow in Hawai‘i;
- **Trever Asam** - current partner at Cades Schutte and current DreamHouse, Inc. legal representative;

Four members of the applicant team have school leadership experience, training, and developmental program experience they bring to this board. Dr. Zuercher, Mrs. Henzerling, and Alex Teece have all been responsible for hiring, onboarding, and developing multiple full-time and temporary employees inside and outside of educational settings. Seven of the eight applicant team members have experience sitting on at least one Nonprofit board related to education and monitoring operational performance; four members have served on School Boards and board committees pertaining to facility acquisition, development, and management. One board member and one partner are practicing attorneys in Honolulu County and specialize in nonprofit law as well as education.

2. A description that identifies any organizations, agencies, or consultants that are essential partners in planning, establishing, or implementing the proposed school's Organizational Plan; explains the current and planned roles of such partners and any resources they have contributed or plan to contribute to the proposed school's development of its Organizational Plan; and includes evidence of support, included in **Attachment HH** (as referenced in Criterion V.A.3), from such essential partners demonstrating these partners are committed to planning, establishing, and/or implementing the Organizational Plan.

Essential Partners - Charter School Development Corporation (CSDC); Hawai'i Modular Space (HIDOE provider), Anderson Anderson; The City and County of Honolulu, the University of Hawai'i at West O'ahu, 'Ewa Beach United Methodist Church, and Pensa Nuwind (Pohakupuna landowner); 'Ewa Beach Neighborhood Board; Cades Schutte; DreamHouse, Inc. Please see **Attachment HH** for evidence of support.

C. Financial Management Capacity

1. Evidence that the key members of the proposed school's financial team have the collective qualifications and capacity (which may include, but is not limited to, documented and relevant credentials and experience reflected in the resumes of all members and an understanding, as demonstrated by the application responses, of challenges, issues, and requirements associated with running a *high-quality charter school*) to implement the school's Financial Plan successfully. The evidence must include a description that:
 - a. Clearly identifies the key members of the applicant's financial team that will play a substantial role in the successful implementation of the Financial Plan, including current or proposed governing board members, school leadership or management, and any essential partners who will play an important ongoing role in the proposed school's Financial Plan; and
 - b. Describes the financial team's individual and collective qualifications for implementing the proposed school's Financial Plan successfully, including sufficient capacity in areas such as financial management, fundraising and development, accounting, and internal controls.
- **Jane Henzerling** - Charter school founder and director, former executive director of Teach For America Miami-Dade responsible for multi-million dollar budget and fundraising goals;

- **Ed Kaukani** - 20+ years of finance and management experience at First Hawaiian Bank;
- **Dr. Deborah Zuercher** - lead and assisted in obtaining millions of dollars for University of Hawai'i, American Samoa teacher training, and additional local and international educational ventures;
- **Alex Teece** - MBA in finance and accounting, investment banking and credit analysis experience, Nonprofit board and fundraising/finance committee experience, and former Director of Development for multi-million fundraising goals at local Nonprofit;
- **Meilan Akaka** - founding Nonprofit board member and current board member for local foundation;
- **Zach DiIonna** - founding Nonprofit board president, current board member for local charter school with fundraising duties;
- **Jacob Karasik** - former manager of development for local Nonprofit, supports grant-writing and fundraising operations;

Four members of our team have worked in the local Nonprofit fundraising space while coordinating efforts to raise money across foundation, corporate, individual, and state sources; an additional member has executive-level experience in leading fundraising strategy and execution. Two members of our team bring local banking experience including finance, accounting, underwriting, credit analysis, and risk management skills. Three members of the team actively serve on nonprofit boards supporting school fundraising and support operations both locally and on the mainland. Two members of our team serve on foundation/fund boards and conduct application and program due diligence while also informing funding decisions and asset allocation. One member of the team has an MBA in finance and corporate accounting, investment banking and credit analysis experience, and is currently enrolled in graduate courses focused on Nonprofit financial management; this team member also serves on fundraising and finance committees for four local Nonprofits.

2. A description that identifies any organizations, agencies, or consultants that are essential partners in planning, establishing, or implementing the proposed school's Financial Plan; explains the current and planned roles of such partners and any resources they have contributed or plan to contribute to the proposed school's development of its Financial Plan; and includes evidence of support, included in **Attachment HH** (as referenced in [Criterion V.A.3](#)), from such essential partners demonstrating these partners are committed to planning, establishing, and/or implementing the Financial Plan.

Essential Organizations - Local Financial Institutions (Bank of Hawaii, First Hawaiian Bank, Hawaii National Bank, Central Pacific Bank, and American Savings Bank); Local Foundations (Harold K.L. Castle Foundation, the James and Abigail Campbell Family Foundation, The Learning Coalition, Public School Foundation of Hawai'i, the Bank of Hawaii Foundation, and the Hawai'i Community Foundation); National Foundations (Kellogg Foundation, the Weinberg Foundation, the Case Foundation, and potentially the Walton Family Foundation); Additional Funding Vehicles (Charter School Growth Fund, U.S. Department of Agriculture, Partners in Development, Kamehameha Schools, Aloha United Way, and Harvard University seed funding); Compliance, Human Resources, and Auditing Partners (ProService, CW Associates, Ceridian, and PwC). Please see **Attachment HH** for evidence of support.