



THE
Intergenerational
S C H O O L S

Intergenerational Schools

December School Boards Meeting

Published on December 8, 2023 at 5:18 PM EST
Amended on December 13, 2023 at 1:24 PM EST

Date and Time

Wednesday December 13, 2023 at 6:00 PM EST

Location

Near West Intergenerational School

3805 Terrett Avenue, Cleveland, Ohio 44113

Agenda

	Purpose	Presenter	Time
I. Opening Items			6:00 PM
A. Record Attendance		Lynn Carpenter	1 m
B. Call the Meeting to Order		Lynn Carpenter	
C. Consent Agenda Items Including the Approval of Minutes	Approve Minutes	Lynn Carpenter	5 m
D. Consent: HB21 Verification of Residency Monthly Report for All Three Schools.	Vote		
E. Consent: Contract Actions LIS ONLY-Haley Bizub	Vote		

	Purpose	Presenter	Time
F. Consent: Personnel Actions	Vote		
G. TIS ONLY-Sponsor Fall Modification	Vote		
H. Annual Approval of Treasurer's Bond			
I. Approval of Designated Seizure Plan Employees			
J. Annual Policy Renewal ALL-Special Education Policies and Procedures	Vote		
K. TIS-Reading Achievement Plan	Vote		
II. Sponsor Update			6:06 PM
A. ESCLEW Update	FYI	Joyce Lewis	5 m
B. CMSD Sponsor Update	FYI	Matt Rado	15 m
III. Academic Excellence			6:26 PM
A. Change to academic calendar			5 m
B. 2024-2025 Enrollment Numbers			
C. School Improvement Plan Reports	FYI	Principals	25 m
IV. Governance Advisory Council			6:56 PM
A. Advisory Council and FIGS Board Charges	Discuss	Bob Nicolay	15 m
Each Advisory Council and the FIGS/IGCIE Board have a written charge outlining priorities for the work to be done, aligned with the Strategic Plan. The Governance Advisory Council has reviewed and revised these for Board approval.			
V. HR Advisory Council			7:11 PM
A. Update on Compensation Plan	FYI	Aaron Davidson-Bey	5 m
B. Starting Salary Exemption for Advanced Degree			
VI. Facilities Advisory Council			7:16 PM

	Purpose	Presenter	Time
A. Updates on LIS Lease and TIS	FYI	Mark Olson	5 m
VII. Finance			7:21 PM
A. Approval of October and November Financials	Vote	Doug Mangen for Cena Hilliard	5 m
VIII. Strategic Plan Indicators and Dashboards			7:26 PM
Brooke King, Executive Director will give an overview of progress on the Strategic Plan.			
A. Dashboards	Discuss	Brooke King	5 m
IX. Development Report from Inbloom			7:31 PM
A. Development Update and Next Steps	FYI		5 m
X. Executive Session			
To consider the appointment, employment, dismissal, discipline, demotion, or compensation of a public employee or the investigation of charges or complaints against an employee.			
XI. Closing Items			7:36 PM
A. Other New Business	Discuss	Lynn Carpenter	5 m
B. Adjourn Meeting	Vote		
C. Resolutions			

Coversheet

Consent: Contract Actions

Section:	I. Opening Items
Item:	E. Consent: Contract Actions
Purpose:	Vote
Submitted by:	
Related Material:	Renewal-Haley Bizub-LIS.pdf



INDEPENDENT CONTRACTOR AGREEMENT

THIS AGREEMENT entered into this date, December 5, 2023 by and between Lakeshore Intergenerational School (LIS) hereinafter called LIS and Haley Bizub hereinafter called the Academic Assistant.

LIS requires the service of an independent, qualified **Academic Assistant** to manage said programs and,

WHEREAS, Academic Assistant is deemed qualified to perform in this capacity and is interested in doing so.

THE PARTIES AGREE TO AS FOLLOWS:

I. TERM

LIS shall engage Academic Assistant in the capacity set forth from December 11, 2023 through December 20, 2023 or until either party wishes to terminate this Independent Contractor agreement at any time with 10 business day notice.

II. PAYMENT

The Academic Assistant shall receive \$25/hour for their work with students for literacy support as assigned by the school principal or instructional coach in the hours of 8:00 am and 3:00 pm on Monday-Friday, December 11-December 20 (8 days), plus up to two (2) planning conversations of no more than two (2) hours each, to support literacy planning and data collection, for a total payment not to exceed \$1,500.

III. RESPONSIBILITY OF PARTIES

The parties herein intend that an independent contractor relationship will be created by this contract. LIS is interested in the conduct, control, and completion of the work as set forth in Section IV will lie solely with the Academic Assistant.

IV. ACADEMIC ASSISTANT RESPONSIBILITY

JOB'S PRIMARY DUTIES AND RESPONSIBILITIES

- Arrive timely and be ready to begin promptly at 8:00am
- Implement the assigned literacy support program to students
- Be flexible and ready to adjust plans to meet the needs of students
- Create strong relationships with students

- Provide a calm and understanding approach with students
- Check in with the principal and/or instructional coach, and ask questions as needed

V. LIS RESPONSIBILITY

A. Pay Academic Assistant within 30 days of completion of project.

VI. INDEPENDENT CONTRACTOR STATUS

The status of the Academic Assistant shall be that of independent contractor and the Independent Contractor shall not be considered employees of the LIS and shall not be entitled to receive any fringe benefits associated with regular employment and shall not be subject to the provisions of LIS. The Academic Assistant shall be responsible for payment of all federal, state and local taxes associated with compensation received pursuant to this Agreement. LIS in no way controls, directs or has any direct responsibility for the actions of the Academic Assistant herein.

VII. NON-DISCRIMINATION

The parties to this Agreement shall not discriminate against any individual in any way due to race, color, religion, sexual orientation, age, gender, handicap, or national origin. The parties agree to be bound by applicable state and federal rules governing Equal Employment Opportunity and Non-Discrimination.

VIII. AMERICANS WITH DISABILITIES ACT

The Academic Assistant shall comply with all applicable provisions of the Americans with Disabilities Act (Public Law 101-336, 42 USC 12101-12213) and all applicable Federal Regulations under the Act including 28 CFR Parts 35 & 36.

IX. INDEMNIFICATION

The Academic Assistant shall indemnify, defend, and hold harmless LIS, its officers, departments, divisions, employees, and agents from and against any and all suits, actions, legal or administrative proceedings, claims, demands, or damages of any kind or nature arising out of this Agreement which are attributed to any act or omission of the Academic Assistant, its agents, employees, or anyone acting under Academic Assistant's direction, control, or on Academic Assistant's behalf in connection with or incident to this Agreement.

X. ENTIRE AGREEMENT

This agreement contains the entire contract between the parties and it may not be modified, amended, altered or extended except through a written amendment signed by all parties.

IN WITNESS HEREOF, the parties hereto have caused this Agreement to be executed as of the date first appearing above.

Haley Bizub, Academic Assistant

By: _____

Date: _____

Approved by LIS

Brooke King, Executive Director

By: _____

Date: _____

Coversheet

TIS ONLY-Sponsor Fall Modification

Section: I. Opening Items
Item: G. TIS ONLY-Sponsor Fall Modification
Purpose: Vote
Submitted by:
Related Material: Fall 2023 Modification Updates.docx.pdf



Educational Service Center of Lake Erie West Community Schools Center

Fall 2023 Community School Modification Updates

Below, please find a description and explanation of the major updates to your community school contract in this contract modification. Your school's modification may also include school-specific changes. If you have any questions about these changes or your school-specific updates, please contact Kurt Aey or Julie Kadri.

Sections 1.6 and 6.11 – Pursuant to changes in the Budget Bill, the Ohio Department of Education (“ODE”) will be restructured as a new state agency now called the “Ohio Department of Education and Workforce.” References to ODE were revised to reflect the name of the successor agency.

Section 4.1 – Compliance with Ohio Laws. We updated this section to include statutory changes to the language of R.C. 3314.03 required by legislation passed by the General Assembly. R.C. 3314.03 states a number of laws that community schools are required to follow.

Section 8.11 – The Budget Bill imposed additional restrictions on a schools ability to employ in any capacity an individual whose educator license was permanently revoked.

Attachment 11.6 – Performance Accountability Framework. The Performance Accountability Framework has been updated to reflect changes to report card data.

Coversheet

Annual Policy Renewal

Section: I. Opening Items
Item: J. Annual Policy Renewal
Purpose: Vote
Submitted by:
Related Material: 23-24 NWIS SpEd Policies and Procedures.pdf
23-24 TIS SpEd Policies and Procedures.pdf
23-24 LIS SpEd Policies and Procedures.pdf



SPECIAL EDUCATION MODEL POLICIES AND PROCEDURES

Adopted on:

12-13-2023

Date

By:

Near West Intergenerational School

District

July 1, 2009

INTRODUCTION

By adopting these Model Policies and Procedures, the _____ (the “District”) is adopting written policies and procedures regarding the manner in which the District fulfills its obligations under the Individuals with Disabilities Education Improvement Act of 2004 (IDEA) and the *Ohio Operating Standards for Ohio Educational Agencies Serving Children with Disabilities* (hereafter referred to as the “Operating Standards”). The Operating Standards require that the District adopt written policies and procedures in a number of different areas, and the District has chosen to adopt the model policies and procedures promulgated by the Ohio Department of Education’s Office for Exceptional Children (ODE-OEC) in order to satisfy these requirements of the Operating Standards.

This document, while comprehensive, does not include every requirement set forth in the IDEA, the regulations implementing IDEA, the Operating Standards, the Ohio Revised Code (ORC) and/or the Ohio Administrative Code (OAC). The District recognizes its obligation to follow these laws, regardless of whether their provisions are restated in the Model Policies and Procedures.

I. FREE APPROPRIATE PUBLIC EDUCATION (FAPE)

The District ensures that a free appropriate public education (FAPE) is made available to all children with disabilities between the ages of 3 and 21, inclusive, in accordance with IDEA and the Operating Standards.

A. RESIDENTIAL PLACEMENT

If the District places a child with a disability in a public or private residential program deemed necessary to provide special education and related services to a child with a disability, the program, including non-medical care and room and board, is at no cost to the parents of the child.

B. ASSISTIVE TECHNOLOGY

The District makes assistive technology available if required as part of the child's special education, related services or supplementary aids and services.

C. EXTENDED SCHOOL YEAR (ESY) SERVICES

The District ensures that extended school year services are provided if a child's individualized education program (IEP) team determines that the services are necessary for the provision of FAPE to the child. If a child is transitioning from Part C services, the District considers extended school year (ESY) services as part of the IEP process.

D. NONACADEMIC SERVICES

The District takes steps, including the provision of supplementary aids and services determined appropriate and necessary by the child's IEP team, to provide nonacademic and extracurricular services and activities in the manner necessary to afford children with disabilities an equal opportunity for participation in those services and activities as provided to students without disabilities.

Nonacademic and extracurricular services and activities include counseling services, athletics, transportation, health services, recreational activities, special interest groups or clubs sponsored by the school district, referrals to agencies that provide assistance to individuals with disabilities and employment of students, including both employment by the school district and assistance in making outside employment available.

E. PROGRAM OPTIONS AND PHYSICAL EDUCATION

The District takes steps to ensure that children with disabilities served by the District have available to them the variety of educational programs and services available to nondisabled

children served by the school district, including art, music, industrial arts, consumer and homemaking education and vocational education.

The District ensures that a child with a disability receives appropriate physical education services. The District affords each child with a disability the opportunity to participate in a regular physical education program available to non-disabled children, unless the child is enrolled full time in a separate facility or needs specially designed physical education, as prescribed in the child's IEP. The District provides a specially designed physical education program if prescribed by the IEP.

For preschool children, the District considers adapted physical education or related services, as appropriate, in conjunction with center-based or itinerant teacher services, and considers the factors set forth in 3301-51-11(F) of the Operating Standards.

F. TRANSPORTATION

The District provides, as a related service, transportation service in accordance with IDEA and the Operating Standards.

II. CONFIDENTIALITY

The District safeguards the confidentiality of personally identifiable information at use, collection, storage, retention, disclosure and destruction stages. In the District, _____ (name of responsible official) is responsible for maintaining the confidentiality of personally identifiable information. The District ensures that all persons collecting or using personally identifiable information receive training and instruction regarding the District's policies regarding that information. The District maintains for public inspection a current listing of the names and positions of those employees within the agency who may have access to personally identifiable information. The District gives notice to all parents of students receiving special education and related services that is adequate to fully inform parents about confidentiality requirements, in accordance with 3301-51-04(C) of the Operating Standards. The District also ensures that its contractors adhere to applicable confidentiality requirements.

A. ACCESS RIGHTS

The District permits parents (or a representative of a parent) to inspect and review any education records relating to their children that are collected, maintained, or used by the District. If any education record includes information on more than one child, the parents of those children have the right to inspect and review only the information relating to their child or to be informed of that specific information. The District does not charge a fee to search for or retrieve information. The District may charge a fee for copies of records, but does not charge a fee for copies of records that will effectively prevent the parents from exercising their right to inspect and review records.

The District complies with a request to access records without unnecessary delay and before any meeting regarding an IEP, or any hearing pursuant to 3301-51-05 of the Operating Standards, and any resolution session pursuant to 3301-51-05 of the Operating Standards, and in no case more than 45 days after the request has been made.

The District responds to reasonable requests for explanations and interpretations of the records, provides copies if failure to provide copies would effectively prevent the parent from exercising the right to inspect and review the records and permits a representative of a parent to inspect and review records.

The District presumes that a parent has the authority to inspect and review records relative to that parent's child unless the District has been advised that the parent does not have the authority under applicable state law governing such matters as guardianship, separation and divorce.

Upon request, the District provides parents a list of the types and locations of education records collected, maintained or used by the District.

The District keeps a record of parties obtaining access to education records collected, maintained or used under Part B of the IDEA (except access by parents and authorized employees of the

participating agency), including the name of the party, the date access was given and the purpose for which the party is authorized to use the records.

B. AMENDMENT OF RECORDS/HEARING PROCESS

If a parent requests the District to amend the information in the education records collected, maintained or used in the provision of special education or related services, the District decides whether to amend the information in accordance with the request within a reasonable period of time. If the District decides to refuse to amend the information in accordance with the request, it informs the parent of the refusal and advises the parent of the right to a hearing as set forth below and in 3301-51-04 of the Operating Standards.

(1) HEARING PROCEDURE

If the parent requests a hearing to challenge information in education records, the hearing is conducted in accordance with the procedures in 34 Code of Federal Regulations (C.F.R.) 99.22 (July 1, 2005) and within a reasonable period of time after the District receives the request. The hearing is conducted in accordance with the following procedures:

- (a) The parents shall be given notice of the date, time and place reasonably in advance of the hearing;
- (b) The records hearing shall be conducted by any individual, including an official of the District, who does not have a direct interest in the outcome of the hearing;
- (c) The parents shall be afforded a full and fair opportunity to present evidence relevant to the child's education records and the information the parent believes is inaccurate or misleading or violates the privacy or other rights of the child;
- (d) The parents may, at their own expense, be assisted or represented by one or more individuals of their choice, including an attorney;
- (e) The District makes its decision in writing within a reasonable period of time after the hearing; and
- (f) The decision is based solely upon the evidence presented at the hearing and includes a summary of the evidence and the reasons for the decision.

(2) RESULTS OF HEARING

If the District, as a result of the hearing, decides that the information is inaccurate, misleading or otherwise in violation of the privacy or other rights of the child, it amends the information accordingly and informs the parent in writing.

If the District, as a result of the hearing, decides that the information is not inaccurate, misleading or otherwise in violation of the privacy or other rights of the child, it must inform the parent of the parent's right to place in the child's records a statement commenting on the information or setting forth any reasons the parents disagree with the decision of the District.

Any explanation placed in the records of a child are:

- (a) Maintained by the District as part of the records of the child as long as the record or contested portion is maintained by the District; and

- (b) Disclosed any time the records of the child or the contested portion is disclosed by the District to any party.

C. PARENTAL CONSENT PRIOR TO DISCLOSURE OF RECORDS

The District obtains parental consent before personally identifiable information is disclosed to parties, other than officials of participating agencies in accordance as defined by 3301-51-04(B)(3) of the Operating Standards, unless the information is contained in education records and the disclosure is authorized without parental consent under the Family Educational Rights and Privacy Act of 1974, August 1974, 20 U.S.C. 1232g (FERPA).

The parent's consent must be in writing, signed and dated and must:

- (1) Specify the records to be disclosed;
- (2) State the purpose of the disclosure; and
- (3) Identify the party or class of parties to whom the disclosure may be made.

The District obtains parental consent, or the consent of an eligible child who has reached the age of majority under Ohio law, before personally identifiable information is released:

- (1) To officials of participating agencies providing or paying for transition services in accordance with 3301-51-07 of the Operating Standards;
- (2) To officials in another district or school in connection with the child's enrollment in a nonpublic school; and/or
- (3) For purposes of billing insurance and/or Medicaid.

D. TRANSFER OF RIGHTS AT AGE OF MAJORITY

The District affords rights of privacy to children similar to those afforded to parents, taking into consideration the age of the child and type or severity of disability.

The rights of parents regarding education records under FERPA transfer to the child at age 18.

If the rights accorded to parents under Part B of the IDEA are transferred to a child who reaches the age of majority (which is 18 in Ohio), the rights regarding education records also transfer to the child. See Chapter IV, Procedural Safeguards, Section G, regarding the transfer of rights under IDEA at the age of majority.

Once a child reaches the age of 17, the IEP must include a statement that the child has been informed regarding this transfer of rights.

E. DISCIPLINARY INFORMATION AND REPORTS TO LAW ENFORCEMENT

The District includes in the records of a child with a disability a statement of any current or previous disciplinary action that has been taken against the child and transmits the statement to

the same extent that disciplinary information is included in, and transmitted with, the records of nondisabled children.

When a child transfers from the District, the transmission of any of the child's records includes both the child's current IEP and any statement of current or previous disciplinary action that has been taken against the child.

A statement of disciplinary action shall:

- (1) Specify the circumstances that resulted in the disciplinary action and provide a description of the disciplinary action taken if the disciplinary action was taken because the child:
 - (a) Carried a weapon to or possessed a weapon at school, on school premises or to or at a school function;
 - (b) Knowingly possessed or used illegal drugs, or sold or solicited the sale of a controlled substance, while at school, on school premises or at a school function; or
 - (c) Inflicted serious bodily injury upon another person while at school, on school premises or at a school function; and
- (2) Include any information that is relevant to the safety of the child and other individuals involved with the child.

A statement of disciplinary action may include a description of any other behavior engaged in by the child that required disciplinary action, and a description of the disciplinary action taken.

If the District reports a crime to the appropriate law enforcement officials, the District transmits copies of the special education and disciplinary records of the child to those officials only to the extent that the transmission is permitted by FERPA and any other applicable laws.

F. DESTRUCTION OF RECORDS

The District informs parents when personally identifiable information is no longer needed to provide educational services to the child. If the parents request, the information is then destroyed. However, a permanent record of a student's name, address, telephone number, grades, attendance record, classes attended, grade level completed and year completed is maintained without time limitation.

III. CHILD FIND

In accordance with federal law, the District assumes responsibility for the location, identification and evaluation of all children birth through age 21 who reside within the district and who require special education and related services.

This includes students who are:

- (1) Advancing from grade to grade;
- (2) Enrolled by their parents in private elementary or private secondary schools, including religious schools, located in our District (regardless of the severity of their disability);
- (3) Wards of the state and children who are highly mobile, such as migrant and homeless children; and
- (4) Home-schooled.

A. RESPONSIBILITY FOR DETERMINING ELIGIBILITY

In the District, the Evaluation Team ensures that the student meets the eligibility requirements of IDEA and state regulations.

In all cases, the Evaluation Team will not determine that a student has a disability if the suspected disability is because of a lack of instruction in reading or math. If the student is not proficient in English, the District will not identify the student as disabled if the limited English proficiency (LEP) is the cause of the suspected disability.

B. CHILD IDENTIFICATION PROCESS

(1) GENERAL

The District has a child identification process that includes the location, identification and evaluation of a child suspected of having a disability. _____
(title of individual or department) coordinates the child identification process. The department and its staff use a variety of community resources and systematic activities in order to identify children requiring special services. District staff members consult with appropriate representatives of private school students attending private schools located in the District in carrying out this process. The District ensures that this process for students attending private or religious schools located in the District is comparable to activities undertaken for students with disabilities in the public schools.

(2) IDENTIFICATION OF CHILDREN BETWEEN THE AGES OF BIRTH TO AGE 3.

When the District becomes aware of a child between the ages of birth to 3 who has or may have a disability, it either:

- (a) Makes a child referral directly to the county family and children first council responsible for implementing the “Help Me Grow” (HMG) early intervention services under Part C of the IDEA; and/or

- (b) Provides the parents with the information so that they can make the referral themselves.

Parents may opt out of and/or opt not to be referred for Part C services. They may request an evaluation from the District to determine if their child has a disability that may require special education. These parents are entitled to an evaluation from the District, even if the child is between the ages of birth to 3. The District is responsible for providing an evaluation but is not responsible for the provision of FAPE for an eligible child until the child is age 3.

(3) TRANSITION TO SPECIAL EDUCATION FROM HELP ME GROW (HMG).

The District and the county family and children first council responsible for HMG have a current interagency agreement that includes processes for the referral of children from HMG to the District. The District has an assigned transition contact, _____, who is the primary person responsible for contact with HMG regarding children transitioning from that program.

- (a) If invited by a representative of HMG (and with parent permission), a District representative attends a transition conference to discuss transition from early intervention services to preschool for a child suspected of having a disability.
- (b) If the parents request, the District invites the Part C service coordinator to the initial IEP meeting.

If there is a suspected disability and the child is eligible for special education and related services as a preschool child, the District works to ensure that an IEP is in place and implemented by the child's third birthday. In the case of children who are 45 days or less from their 3rd birthdays and who are suspected of having disabilities, an evaluation is completed within 60 days of parental consent, but an IEP is not required by their third birthdays.

As part of the IEP process, the IEP team determines if extended school year services are required for the preschool child.

(4) COORDINATION WITH OTHER AGENCIES.

The District has interagency agreements with Head Start programs within the school district's service delivery that provide for:

- (a) Service coordination for preschool children with disabilities, 3 through 5 years of age, in a manner consistent with the state interagency agreement for service coordination with Head Start; and
- (b) Transition of children eligible for special education and related services as a preschool child at age 3.

The District also has interagency agreements with the relevant county board(s) of MR/DD for identification, service delivery and financial responsibilities to adequately serve preschool children with disabilities 3 through 5 years of age.

C. DATA COLLECTION

The District maintains an education management information system and submits data to ODE pursuant to rule 3301-14-01 of the Administrative Code. The District's collection of data includes information needed to determine if significant disproportionality based on race and ethnicity is occurring in the District with respect to the identification of children as children with disabilities, the placement of children in educational settings and the incidence, duration and type of disciplinary actions.

IV. Procedural Safeguards

A. PRIOR WRITTEN NOTICE

The District provides prior written notice as required by IDEA and Operating Standards. See Appendix A which summarizes the situations in which prior written notice is required. The District uses the form required by ODE-OEC Prior Written Notice PR-01.

(1) CONTENT OF PRIOR WRITTEN NOTICE

The prior written notice, in accordance with the IDEA regulations and the Operating Standards, includes the following information to ensure that parents are fully informed of the action being proposed or refused:

- (a) A description of the action proposed or refused by the District;
- (b) An explanation of why the District proposes or refuses to take this action;
- (c) A description of other options that the IEP team considered and the reasons why those options were rejected;
- (d) A description of each evaluation procedure, assessment, record or report that the District used as a basis for the proposed or refused action;
- (e) A description of other factors that are relevant to the District's proposal or refusal;
- (f) A statement that the parents of a child with a disability have procedural safeguards and, if the notice is not an initial referral for evaluation, the means by which a copy of the description of procedural safeguards can be obtained; and
- (g) Sources for parents to contact to obtain assistance in understanding the provisions of Ohio's rule regarding procedural safeguards.

(2) COMMUNICATION OF THE PRIOR WRITTEN NOTICE

The District provides the notice in the native language of the parents or other mode of communication used by the parents unless it is clearly not feasible to do so.

If the native language or other mode of communication is not a written language, the District takes steps to have the notice translated orally or by other means to the parent in the parent's native language or other mode of communication. The District takes steps to ensure that such parents understand the content of the notice and maintains written evidence that both requirements set forth in this paragraph, if applicable, have been met.

The District may provide the prior written notice, procedural safeguards notice and the notification of a due process complaint by e-mail if the parents choose to receive the notices electronically.

B. PROCEDURAL SAFEGUARDS NOTICE

Parents of a child with a disability are entitled to specific procedural safeguards under IDEA and the Operating Standards.

Whose IDEA Is This? A Parent's Guide to the Individuals with Disabilities Education Improvement Act of 2004, developed by ODE-OEC, includes a full explanation of these procedural safeguards as required by IDEA and 3301-51-02, 3301-51-04 and 3301-51-05 of the Operating Standards.

The District provides parents with a copy of *Whose IDEA Is This?* at least once a year. This includes:

- (1) Providing a copy to the parents of a child who transfers into the District from out-of-state; and
- (2) Providing a copy to the parents of a child who transfers into the District from an in-state school if the sending District has not provided a copy to the parents during the current school year.

In addition, the District provides parents with a printed copy of this procedural safeguards notice in each of the following circumstances:

- (1) The initial referral or parental request for evaluation;
- (2) The receipt of the first due process complaint in a school year;
- (3) A change in placement for disciplinary action; and
- (4) When requested by the parents or the child who has reached the age of majority.

In providing *Whose IDEA is This?*, the District follows the procedures for communication that are described above under Prior Written Notice.

C. PARENTAL CONSENT

Consent means that the parents:

- (a) Have been fully informed, in the parents' native language or other mode of communication, of all information relevant to the activity for which consent is sought;
- (b) Understand and agree in writing to the carrying out of the activity for which the consent was asked. The consent describes that activity and lists the records (if any) that will be released and to whom they will be released; and
- (c) Understand that the granting of consent is voluntary and may be revoked at any time.

(1) ACTIONS REQUIRING INFORMED WRITTEN PARENTAL CONSENT

The District obtains written consent from the parents before:

- (a) Conducting an initial evaluation to determine if a child is eligible for special education;
- (b) Initially providing special education and related services;
- (c) Conducting a reevaluation when assessments are needed;
- (d) Making a change in placement on the continuum of alternative placement options (i.e., regular classes, special classes, special schools, home instruction and instruction in hospitals and institutions); and
- (e) Releasing personally identifiable information about the child to any person other than a person authorized to obtain those records without parental consent pursuant to FERPA. For example, parental consent is obtained prior to releasing records to a representative of

an agency that is likely to be responsible for providing or paying for transition services or for the purposes of billing Medicaid.

The District uses the ODE-OEC required Consent for Evaluation PR-05 form to obtain written parental consent for evaluation and reevaluation and the required IEP PR-07 form to obtain written parental consent for the initial provision of special education and related services and for making a change in placement.

The District does not obtain written parental consent when reviewing existing data as part of an evaluation or reevaluation or when administering a test or evaluation that is given to all children, unless consent is required of all parents.

(2) CHANGE IN PLACEMENT

Once the District receives the initial parental consent for special education and related services, the District must obtain consent only for a change in placement. A “change of placement” means a change from one option on the continuum of alternative placements to another (instruction in regular classes, special schools, home instruction and instruction in hospitals and institutions).

If the District cannot obtain parental consent, it may file a due process complaint requesting a due process hearing or engage in conflict resolution to obtain agreement or a ruling that the placement may be changed.

(3) PARENTS’ FAILURE TO RESPOND OR REFUSAL TO PROVIDE CONSENT

The District makes “reasonable efforts” to contact parents and obtain written parental consent that may include:

- (a) Written correspondence;
- (b) Phone calls;
- (c) Electronic mail communications, to include but not limited to e-mail and password-protected parent pages; and/or
- (d) Visits to the home or parents’ places of employment.

The District documents its attempts. If the parents fail to respond or refuse to provide consent, the District proceeds as follows:

(4) INITIAL EVALUATION

If the parents fail to respond to the District’s efforts to obtain consent or refuse consent for the initial evaluation, the District may:

- (a) Request a due process hearing and engage in conflict resolution (e.g., resolution meeting and/or mediation) to convince the parents to provide their consent; or
- (b) Decide not to pursue the initial evaluation and provide the parents with prior written notice.

If the child is being home schooled or has been placed in a private school at the parents' expense, the District cannot file a due process complaint or request the parents to participate in a resolution meeting and/or mediation.

(5) REEVALUATION

If the parents fail to respond to the District's efforts to obtain consent for a reevaluation when assessments are needed, the District proceeds with the reevaluation.

If the parents expressly refuse consent for a reevaluation when assessments are needed, the District may:

- (a) Agree with the parents that a reevaluation is unnecessary;
- (b) Conduct a reevaluation by utilizing data and/or documentation that the District already possesses;
- (c) Request a due process hearing and engage in conflict resolution (e.g., resolution meeting and/or mediation) to convince the parents to provide their consent; or
- (d) Decide not to pursue having the child reevaluated.

The District continues to provide FAPE to the child if the District agrees with the parents that a reevaluation is unnecessary.

(6) INITIAL PROVISION OF SPECIAL EDUCATION AND RELATED SERVICES

If the parents do not attend the IEP meeting to develop the IEP for the initial provision of services, the District attempts to obtain written parental consent through other methods such as calling the parents, corresponding with the parents and or visiting the parents.

If the parents expressly refuse consent, as evidenced by their signatures on the IEP indicating that consent is not given, the District maintains a copy of the signed IEP showing that the District offered FAPE.

If the parents fail to respond or refuse consent, the District provides the parents with prior written notice and continues to provide the child with appropriate interventions in the regular education classroom. The District may not request a due process hearing or engage in conflict resolution to obtain agreement or a ruling that services may be provided to the child.

The District does not use the parents' refusal to consent to one service or activity to deny the parents or the child any other service, benefit or activity in the District, except in those instances in which IDEA authorizes that denial.

(7) REVOCATION OF CONSENT

The parents may revoke consent for and remove the child from special education and related services. Once the District receives written revocation of consent, it provides the parents with prior written notice and continues to provide the child with appropriate interventions through the regular education environment.

The District is not required to amend the child's education records to remove any references to the child's receipt of special education and related services because of the revocation of consent.

If a parent has provided written revocation of consent, the District does not file a due process complaint or engage in conflict resolution to attempt to obtain agreement or a ruling that special education and related services may be provided to the child.

D. INDEPENDENT EDUCATIONAL EVALUATION

Parents who disagree with an evaluation that was completed or obtained by the District may request an independent educational evaluation at public expense. Parents are entitled to request only one independent educational evaluation at public expense each time the District conducts an evaluation with which the parents disagree.

(1) INDEPENDENT EDUCATIONAL EVALUATION AT PUBLIC EXPENSE

If the parents request an independent educational evaluation at public expense, the District either:

- (a) Ensures that an independent evaluation is provided at public expense; or
- (b) Files a due process complaint requesting a hearing to show that the District's evaluation is appropriate.

If the District files a due process complaint and the final decision is that the District's evaluation is appropriate, the parent still has the right for an independent educational evaluation, but not at the public expense.

(2) PARENT INITIATED EVALUATIONS

If a parent obtains an independent educational evaluation at public expense or shares with the District an evaluation obtained at private expense, the District considers that evaluation, if it meets District criteria, in any decision made with respect to the provision of FAPE to the child.

(3) DISTRICT CRITERIA

If an independent educational evaluation is at public expense, the criteria under which the evaluation is obtained, including the location of the evaluation and the qualifications of the examiner, must be the same as the criteria which the District uses when it initiates an evaluation, to the extent those criteria are consistent with the parent's right to an independent educational evaluation. Except for the above-mentioned criteria, the District does not impose conditions or timelines related to obtaining an independent educational evaluation at public expense.

E. CONFLICT RESOLUTION

(1) ADMINISTRATIVE REVIEWS

Within 20 days of receipt of a complaint from a child's parents or another educational agency, the District's superintendent, or the superintendent's designee, conducts a review, may hold an administrative hearing and notifies all parties of the decision in writing.

- (a) All parties have the right to invite others, including legal counsel, to participate in the review.
- (b) The review is conducted at a time and place convenient to all parties.
- (c) Every effort is made to resolve any disagreements at the administrative review.

(2) MEDIATION

At its discretion, the District participates in the resolution of disputes with other parties through the voluntary mediation processes available through ODE-OEC.

(3) IMPARTIAL DUE PROCESS HEARING/RESOLUTION MEETINGS

Due process complaints filed against the District proceed in the manner set forth in 3301-51-05(K) of the Operating Standards.

The District convenes a resolution meeting before the initiation of a due process hearing. The resolution meeting:

- (a) Occurs within 15 days of the receipt of notice of the parents' due process complaint;
- (b) Includes a representative of the District who has decision-making authority on behalf of the District;
- (c) Does not include the District's attorney unless the parents are accompanied by an attorney;
- (d) Provides an opportunity for the parents to discuss their due process complaint and the facts the complaint is based on; and
- (e) Provides the District an opportunity to resolve the dispute.

The District does not hold a resolution meeting if the parents and the District agree in writing to waive the meeting or agree to use the mediation process. Also, if the District files the due process complaint, it is not required to hold a resolution meeting.

The District, if it is the child's school district of residence, is responsible for conducting the impartial due process hearing utilizing the hearing officer appointed by ODE-OEC. The District follows the procedures required by 3301-51-05(K)(10)–(15) of the Operating Standards when conducting a hearing at a time and place that is reasonably convenient to the parents and the child involved.

If the parents request to inspect and review any education records relating to their child, the District replies without unnecessary delay and makes the records available before the hearing.

The District provides the parents with one copy of the written, or at the option of the parents, an electronic verbatim record of the hearing and findings of fact and decision at no cost. The decision is final except that any party to the hearing may appeal the decision to ODE-OEC.

The District pays for the costs incurred for the hearing except for expert testimony, outside medical evaluations, witness fees, subpoena fees and cost of counsel requested by the other party to the hearing and compensates the hearing officer as provided in 3301-51-05(K)(16)(d) of the Operating Standards. If the hearing was requested by another agency, the District shares the costs of the hearing except for the costs identified in the preceding sentence.

Any further appeals or actions proceed in accordance with 3301-51-05 of the Operating Standards.

F. CHILD'S STATUS DURING DUE PROCESS PROCEEDINGS/CODE OF CONDUCT VIOLATIONS

(1) CHILD'S STATUS DURING DUE PROCESS PROCEEDINGS

The District ensures that a child remains in the current educational placement during the pendency of any administrative or judicial proceeding regarding a due process complaint, unless the state or the District and the parents of the child agree otherwise. If the state level review officer agrees with the child's parents that a change in placement is appropriate, that placement is treated as an agreement between the state and the parents.

If the complaint involves an application for initial admission to the District, the child, with the consent of the parents, is placed in the District until the completion of all proceedings.

If the complaint involves an application for services from a child who is transitioning from Part C to Part B, the District provides those special education and related services that are not in dispute, if the child is found eligible for special education and related services under Part B and the parent consents to the initial provision of special education and related services.

(2) DISCIPLINARY PROCEEDINGS

The District may consider any unique circumstances on a case-by-case basis when determining whether a change in placement, consistent with the other requirements of 3301-51-05 of the Operating Standards, is appropriate for a child with a disability who violates a code of student conduct.

(a) Changes in placement less than 10 consecutive school days

The District may remove a child with a disability who violates a code of student conduct from the child's current placement to an appropriate interim alternative educational setting, another setting, or suspension, for not more than 10 consecutive school days (to the extent those alternatives are applied to children without disabilities), and for additional removals of not more

than 10 consecutive school days in that same school year for separate incidents of misconduct (as long as those removals do not constitute a change of placement).

The District considers on a case-by-case basis whether a pattern of removals constitutes a change of placement. A change in placement occurs if:

- (1) The removal is for more than 10 consecutive school days, **or**
- (2) The child has been subjected to a series of removals that constitute a pattern:
 - (a) Because the series of removals totals more than 10 school days in a school year;
 - (b) Because the child's behavior is substantially similar to the child's behavior in previous incidents that resulted in the series of removals; and
 - (c) Because of such additional factors as the length of each removal, the total amount of time the child has been removed and the proximity of the removals to one another.

(b) Services during removal from current placement

The District provides services to a child removed from the child's current placement as follows:

- (1) If the child has been removed from the child's current placement for 10 school days or less in the school year, services are provided only to the extent that services are provided to a child without disabilities who is similarly removed;
- (2) After a child with a disability has been removed from the child's current placement for 10 school days in the same year (under circumstances in which the current removal is for not more than 10 consecutive days and is **not** a change in placement), the District provides services, as determined by school personnel in consultation with at least one of the child's teachers, so as to enable the child to continue to participate in the general education curriculum, although in another setting, and to progress toward meeting the goals set out in the child's IEP;
- (3) If the removal is a change in placement, the child's IEP team determines appropriate services; and
- (4) If a child with a disability is removed from the child's current placement for either more than 10 consecutive days for behavior that is determined **not** to be a manifestation of the child's disability or under circumstances that constitute special circumstances, as defined below, the District ensures that the child:
 - (a) Continues to receive educational services so as to enable the child to continue to participate in the general education curriculum, although in another setting, and to progress toward meeting the goals set out in the child's IEP; and
 - (b) Receives, as appropriate, a functional behavioral assessment and behavioral intervention services and modifications that are designed to address the behavior violation so that it does not recur.

(c) Manifestation determination

Within 10 school days of any decision to change the placement of a child with a disability because of a violation of a code of student conduct, the school district, the parent and relevant members of the child's IEP team (as determined by the parent and the school district) must review all relevant information in the child's file, including the child's IEP, any teacher observations and any relevant information provided by the parents to determine if the conduct

was a manifestation of the child's disability. The District determines that the conduct is a manifestation of the child's disability:

- (1) If the conduct in question was caused by, or had a direct and substantial relationship to, the child's disability; or
- (2) If the conduct in question was the direct result of the school district's failure to implement the IEP.

If the District, parents and relevant members of the IEP team determine that the conduct in question was the direct result of the school district's failure to implement the IEP, the District takes immediate steps to remedy those deficiencies.

- (1) If the conduct was a manifestation of the child's disability, the IEP team either:
 - (a) Starts to conduct a functional behavioral assessment within 10 days of the manifestation determination and complete the assessment as soon as practicable, unless the school district had conducted a functional behavioral assessment before the behavior that resulted in the change of placement occurred, and implemented a behavioral intervention plan for the child; **or**
 - (b) If a behavioral intervention plan already has been developed, within 10 days of the manifestation determination, reviews the behavioral intervention plan and the implementation of the plan, and modifies it, as necessary, to address the behavior subject to disciplinary action; **and**
- (2) Returns the child to the placement from which the child was removed, unless the parent and the District agree to a change of placement as part of the modification of the behavioral intervention plan.

(d) Special circumstances.

The District may remove a child to an interim alternative educational setting for not more than 45 school days without regard to whether the behavior is determined to be a manifestation of the child's disability, if the child:

- (1) Carries a weapon to or possesses a weapon at school, on school premises, or to or at a school function under the jurisdiction of ODE or a school district;
- (2) Knowingly possesses or uses illegal drugs, or sells or solicits the sale of a controlled substance, while at school, on school premises, or at a school function under the jurisdiction of ODE or a school district; or
- (3) Has inflicted serious bodily injury upon another person while at school, on school premises, or at a school function under the jurisdiction of ODE or a school district.

The District defines the terms controlled substance, weapon, illegal drug and serious bodily injury in accord with 3301-51-05(K)(20)(h)(i) of the Operating Standards.

On the date on which the decision is made to make a removal that constitutes a change of placement of a child with a disability because of a violation of a code of student conduct, the school district must notify the parents of that decision and provide the parents with the procedural safeguards notice described in Section B above.

(e) Expedited Due Process Hearing

The District or the parents may submit a due process complaint requesting an expedited due process hearing to appeal a decision made during disciplinary procedures.

- (1) The District may request a an expedited due process hearing if it believes that maintaining the current placement of a child is substantially likely to result in injury to the child or to others.
- (2) The parents may request an expedited due process hearing to appeal decisions regarding placement for disciplinary removals or the manifestation determination.

The District is responsible for conducting the expedited due process hearing utilizing the hearing officer appointed by ODE-OEC. The District follows the procedures that apply for other due process hearings except that the expedited due process hearing must occur within 20 school days after the date the due process complaint is filed and no extensions of time shall be granted. The hearing officer then must make a determination within 10 school days after the hearing. The District follows the expedited timelines and the procedures set forth in 3301-51-05(K)(22)(c)-(d) of the Operating Standards.

G. TRANSFER OF PARENTAL RIGHTS AT AGE OF MAJORITY/STUDENT NOTIFICATION

Once a child reaches the age of majority, the District sends all required notices to both the student and parent, unless the student has been determined incompetent under state law. If a child with a disability is incarcerated in an adult or juvenile correctional institution, prior written notices are provided to both the parents and the student.

One year before the child's 18th birthday, the District notifies both the parents and the child of the parental rights that will transfer to the child upon reaching the age of majority (age 18) and provides the child with a copy of *Whose IDEA Is This?* The District documents this notice on the child's IEP PR-07 form.

Once the child turns 18, the District obtains informed written consent, as required by the Operating Standards, from the student, unless the student has been determined incompetent under state law.

H. SURROGATE PARENTS

The District ensures that the rights of a child are protected when:

- (1) No parent, as defined in 3301-51-01 of the Operating Standards, can be identified;
- (2) The District, after making reasonable efforts, cannot locate a parent;
- (3) The child is a ward of the state; or
- (4) The child is an unaccompanied homeless youth as defined by 3301-51-05(E)(1)(d) of the Operating Standards.

One way in which the District protects the rights of such children is through the assignment of surrogate parents where appropriate. The District has a method for determining when a child needs a surrogate parent and for assigning a surrogate parent to the child, and complies with the requirements of 3301-51-05(E) of the Operating Standards regarding surrogate parents.

V. EVALUATION

The District ensures that initial evaluations are conducted and that reevaluations are completed for children residing within the District. The District uses a referral process to determine whether or not a child is a child with a disability. The District also provides interventions to assist a child who is performing below grade-level standards. The provision of intervention services is not used to unnecessarily delay a child's evaluation for purposes of determining eligibility for special education services.

A. INITIAL EVALUATION

1. TIMING AND INITIATION

The district conducts an evaluation before the initial provision of special education and related services. Either a parent of a child or a public agency may initiate a request for an initial evaluation to determine if the child is a child with a disability.

Within 30 days of receipt of a request for an evaluation, the District either obtains parental consent for an initial evaluation or provides to the parents prior written notice stating that the school district does not suspect a disability and will not be conducting an evaluation.

The initial evaluation:

- (a) Is conducted within 60 days of receiving parental consent for the evaluation unless the exception set forth in 3301-51-06(B)(5) of the Operating Standards applies; and
- (b) Consists of procedures:
 - (i) To determine if the child is a child with a disability as defined in 3301-51-01(B)(10) of the Operating Standards; and
 - (ii) To determine the educational needs of the child.

The district obtains parental consent before conducting an evaluation. See Chapter IV, Section C, regarding parental consent requirements.

The evaluation team consists of the IEP team and other qualified professionals.

2. THE EVALUATION PLAN AND EVALUATION TEAM REPORT

As part of the initial evaluation, if appropriate, and as part of any reevaluation, the evaluation team shall develop an evaluation plan that will provide for the following and be summarized in an evaluation team report:

- (a) Review of existing evaluation data on the child, including:
 - (i) Evaluations and information provided by the parents of the child;
 - (ii) Current classroom-based, local or state assessments and classroom-based observations;
 - (iii) Observations by teachers and related services providers;
 - (iv) Data about the child's progress in the general curriculum, or, for the preschool-age child, data pertaining to the child's growth and development;

- (v) Data from previous interventions, including:
 - (a) Interventions required by rule 3301-51-06 of the Operating Standards and
 - (b) For the preschool child, data from early intervention, community, or preschool program providers; and
- (vi) Any relevant trend data beyond the past twelve months, including the review of current and previous IEPs; and
- (b) On the basis of that review and input from the child's parents, identify what additional data, if any, are needed to determine:
 - (i) Whether the child is a child with a disability, as defined in 3301-51-01 of the Operating Standards, and the educational needs of the child;
 - (ii) In the case of a reevaluation of a child, whether the child continues to have such a disability and the educational needs of the child;
 - (iii) The present levels of academic achievement and related developmental needs of the child;
 - (iv) Whether the child needs special education and related services; or
 - (v) In the case of a reevaluation of a child, whether the child continues to need special education and related services; and
 - (vi) Whether any additions or modifications to the special education and related services are needed to enable the child to meet the measurable annual goals set out in the IEP of the child and to participate, as appropriate, in the general education curriculum.

The District administers such assessments and other evaluation measures as may be needed to produce the data identified above. The district provides prior written notice to the parents of a child with a disability that describes any evaluation procedures the school district proposes to conduct.

3. CONDUCT OF EVALUATION

In conducting the evaluation, the District:

- (a) Uses a variety of assessment tools and strategies to gather relevant functional, developmental and academic information about the child, including information provided by the parent, that may assist in determining:
 - (i) Whether the child is a child with a disability as defined in 3301-51-01(B)(10) of the Operating Standards; and
 - (ii) The content of the child's IEP, including information related to enabling the child to be involved in and progress in the general education curriculum (or for a preschool child to participate in appropriate activities);
- (b) Does not use any single measure or assessment as the sole criterion for determining whether a child is a child with a disability and for determining an appropriate educational program for the child; and
- (c) Uses technically sound instruments that may assess the relative contribution of cognitive and behavioral factors, in addition to physical or developmental factors.

The District ensures that:

- (a) Assessments and other evaluation materials used to assess a child:
 - (i) Are selected and administered so as not to be discriminatory on a racial or cultural basis;
 - (ii) Are provided and administered in the child's native language or other mode of communication and in the form most likely to yield accurate information about what the child knows and can do academically, developmentally and functionally, unless it is clearly not feasible to so provide or administer;
 - (iii) Are used for the purposes for which the assessments or measures are valid and reliable;
 - (iv) Are administered by trained and knowledgeable personnel; and
 - (v) Are administered in accordance with any instructions provided by the producer of the assessments.
- (b) Assessments and other evaluation materials include those tailored to assess specific areas of educational need and not merely those that are designed to provide a single general intelligence quotient.
- (c) Assessments are selected and administered so as best to ensure that if an assessment is administered to a child with impaired sensory, manual or speaking skills, the assessment results accurately reflect the child's aptitude or achievement level or whatever other factors the test purports to measure rather than reflecting the child's impaired sensory, manual or speaking skills (unless those skills are the factors that the test purports to measure);
- (d) A school age child is assessed in all areas related to the suspected disability, including, if appropriate, health, vision, hearing, social and emotional status, general intelligence, academic performance, communicative status and motor abilities;
- (e) Preschool children are assessed in the following developmental areas: adaptive behavior, cognition, communication, hearing, vision, sensory/motor function, social-emotional functioning and behavioral function.
- (f) Assessments of children with disabilities who transfer from one school district to another school district in the same school year are coordinated with the children's prior and subsequent schools, as necessary and as expeditiously as possible, consistent with 3301-51-06(B)(5)(b) and (B)(6) of the Operating Standards, to ensure prompt completion of the full evaluations.
- (g) In evaluating each child with a disability under 3301-51-06(E)-(G) of the Operating Standards, the evaluation is sufficiently comprehensive to identify all of the child's special education and related services needs, whether or not commonly linked to the disability category in which the child has been classified.
- (h) Assessment tools and strategies that provide relevant information that directly assists persons in determining the educational needs of the child are provided.
- (i) Medical consultation shall be encouraged for a preschool or school-age child on a continuing basis, especially when school authorities feel that there has been a change in the child's behavior or educational functioning or when new symptoms are detected; and
- (j) For preschool-age children, as appropriate, the evaluation shall include the following specialized assessments:

- (i) Physical examination completed by a licensed doctor of medicine or doctor of osteopathy in cases where the disability is primarily the result of a congenital or acquired physical disability;
- (ii) Vision examination conducted by an eye care specialist in cases where the disability is primarily the result of a visual impairment; and
- (iii) An audiological examination completed by a certified or licensed audiologist in cases where the disability is primarily the result of a hearing impairment.

B. ELIGIBILITY DETERMINATION AND EVALUATION TEAM REPORT

1. COMPLETION OF THE EVALUATION TEAM REPORT

The following occurs upon completion of the administration of assessments and other evaluation measures:

- (a) The IEP team and other qualified professionals and the parent of the child determines whether the child is a child with a disability, in accordance with the Operating Standards; and
- (b) The District provides a copy of the evaluation report and the documentation of determination of eligibility at no cost to the parent.

The written evaluation team report shall include:

- (a) A summary of the information obtained during the evaluation process; and
- (b) The names, titles and signatures of each team member, including the parent, and an indication of whether or not they are in agreement with the eligibility determination. Any team member who is not in agreement with the team's determination of disability shall submit a statement of disagreement.

The District provides a copy of the evaluation team report and the documentation of determination of eligibility or continued eligibility to the parents prior to the next IEP meeting and in no case later than 14 days from the date of eligibility determination.

2. DETERMINATION OF ELIGIBILITY

A child is not determined to be a child with a disability:

- (a) If the determinant factor for that determination is:
 - (i) Lack of appropriate instruction in reading, including the essential components of reading instruction as defined in Section 1208(3) of the Elementary and Secondary Act of 1965, as amended and specified in the No Child Left Behind Act of 2002, January 2002, 20 U.S.C. 6301 (ESEA);
 - (ii) Lack of appropriate instruction in math; or
 - (iii) LEP; and
- (b) If the child does not otherwise meet the eligibility criteria under 3301-51-01(B)(10) of the Operating Standards.

The district, in interpreting evaluation data for the purpose of determining if a child is a child with a disability, does the following:

- (a) Draws upon information from a variety of sources, including aptitude and achievement tests, state and district wide assessments, parent input and teacher recommendations, as well as information about the child's physical condition, social or cultural background and adaptive behavior; and
- (b) Ensures that information obtained from all of these sources is documented and carefully considered.

If a determination is made that a child has a disability and needs special education and related services, the District develops an IEP for the child.

C. REEVALUATIONS

The District conducts reevaluations of a child with a disability:

- (a) If the District determines that the child's educational or related services needs, including improved academic achievement and functional performance, warrant a reevaluation; or
- (b) If the child's parent or teacher requests a reevaluation; or
- (c) When a child transitions from pre-school to school-aged services; or
- (d) In order to make a change in disability category.

A reevaluation may not occur more than once a year, unless the parent and the District agree otherwise.

A reevaluation must occur at least once every three years, unless the parent and the District agree that a reevaluation is unnecessary.

The District evaluates a child with a disability before determining that child is no longer a child with a disability, although this evaluation is not required if the child's eligibility terminates due to graduation from secondary school with a regular diploma or due to exceeding the age eligibility for FAPE under state law. If a child's eligibility terminates for one of these reasons, the District provides the child with a summary of the child's academic achievement and functional performance, which shall include recommendations on how to assist the child in meeting the child's postsecondary goals.

D. IDENTIFYING CHILDREN WITH SPECIFIC LEARNING DISABILITIES (SLD)

The District has written procedures for the implementation of the evaluation process the District uses to determine the existence of a specific learning disability (SLD). In addition, the District uses the form required by ODE-OEC, Evaluation Team Report PR-06 and completes Part 3: Documentation for Determining the Existence of a Specific Learning Disability of PR-06 when the District suspects the child has a SLD.

(1) DETERMINING THE EXISTENCE OF A SPECIFIC LEARNING DISABILITY

The parents, the IEP team, and a group of qualified professionals from the District determine that a child has a SLD if:

- (a) The child does not achieve adequately for the child's age or to meet state-approved grade-level standards in one or more of the following areas, when the District provides learning experiences and instruction appropriate for the child's age or state-approved grade-level standards:
 - (i) Oral expression;
 - (ii) Listening comprehension;
 - (iii) Written expression;
 - (iv) Basic reading skill;
 - (v) Reading fluency skills;
 - (vi) Reading comprehension;
 - (vii) Mathematics calculation; or
 - (viii) Mathematics problem-solving;

AND

- (b) The child does not make sufficient progress to meet age or state-approved grade-level standards in one or more of the areas identified in number 1, above, when the District uses an evaluation process to determine the child's response to scientific, research-based intervention;

OR

- (c) The child exhibits a pattern of strengths and weaknesses in performance, achievement, or both, relative to age, state-approved grade-level standards, or intellectual development, when the District uses appropriate assessments consistent with 3301-51-06(E) and (F) of the Operating Standards that the group has determined to be relevant to the identification of a SLD.

Alternatively, the District may choose a third method of evaluation, for determining if a child has a SLD. The District seeks prior approval from ODE-OEC if it chooses to use an alternative research-based assessment procedure to determine if a child has a SLD.

(2) USE OF AN EVALUATION PROCESS BASED ON THE CHILD'S RESPONSE TO SCIENTIFIC, RESEARCH-BASED INTERVENTION FOR SLD DETERMINATION

If the District uses an evaluation process based on the child's response to scientific, research-based intervention to determine whether a child has a SLD. The District ensures that this process:

- (a) Begins when the District has gathered and analyzed sufficient data from scientifically-based instruction and targeted and intensive individualized interventions that provide evidence that the child's needs are unlikely to be met without certain specialized instruction, in addition to the regular classroom instruction;
- (b) Employs interventions that are scientifically-based and provided at appropriate levels of intensity, frequency, duration and integrity, relative to the child's identified needs;

- (c) Is based on results of scientifically-based, technically adequate assessment procedures that assess ongoing progress while the child is receiving scientifically-based instruction and the results of these procedures have been reported to the child's parents; and
- (d) Includes the analysis of data described in 3301-51-06(H)(3)(b)(i) and (H)(3)(b)(ii) of the Operating Standards to determine whether a discrepancy is present between the child's actual and expected performance, in both the child's rate of progress in developing skills, and in the child's level of performance on measures assessing one or more of the academic areas listed in 3301-51-06(H)(3)(a)(i) of the Operating Standards

The District will not use this process to delay unnecessarily a child's referral for a comprehensive evaluation to determine eligibility for special education services.

(3) ADDITIONAL REQUIREMENTS FOR SLD DETERMINATION

The District ensures that the following additional requirements are satisfied when determining if a child has a SLD:

Inclusion of additional required group members for SLD determination

The group that determines that a child suspected of having a SLD is a child with a disability includes the child's parents and a group of qualified professionals consisting of, but not limited to:

- (a) In the case of a school-age child, the child's regular teacher (or if the child does not have a regular teacher, the District includes a regular classroom teacher qualified to teach a child of the child's age);
- (b) In the case of children less than school-age, an individual qualified by ODE to teach a child of the child's age; and

At least one person qualified to conduct individual diagnostic examinations of children, such as a school psychologist, speech-language pathologist or remedial reading teacher.

Observation requirements

The District ensures that the child is observed in the child's learning environment, including the regular classroom setting, to document the child's academic performance and behavior in the areas of difficulty. The group of qualified professionals identified by the District conducts the observation by:

- (a) Using information from an observation of the child's performance conducted during routine classroom instruction, including monitoring of the child's performance during instruction, that was done before the child was referred for an evaluation; or
- (b) Having at least one member of the group conduct an observation of the child's academic performance in the regular classroom after the child has been referred for an evaluation and parent consent has been obtained.

In the case of a child of less than school-age or a child who is out of school, the District ensures that a group member observes the child in an environment appropriate for a child of that age.

Ensuring the child's underachievement is not due to a lack of appropriate instruction in reading and math

In order to ensure that underachievement in a child suspected of having a SLD is not due to lack of appropriate instruction in reading or math, the District considers:

- (a) Data demonstrating that prior to, or as part of, the referral process, the child received appropriate instruction in regular education settings delivered by qualified personnel; and
- (b) Data-based documentation of repeated assessments of achievement at reasonable intervals, reflecting formal assessment of the child's progress during instruction, the results of which were provided to the child's parents.

Obtaining parental consent to evaluate

The District promptly requests parental consent to evaluate a child to determine if the child needs special education and related services:

- (a) If prior to the referral, the child does not make adequate progress after an appropriate period of time when provided with appropriate instruction. To make this determination, the District considers:
 - (i) Data demonstrating that prior to, or as part of, the referral process, the child received appropriate scientifically-based instruction in regular education settings delivered by qualified personnel; and
 - (ii) Data-based documentation of repeated assessments of achievement at reasonable intervals, reflecting formal assessment of the child's progress during instruction, the results of which were provided to the child's parents; and
- (b) Whenever a child is referred for an evaluation.

Consideration of exclusionary factors

When determining that a child has a SLD, the District ensures that the findings from the evaluation process are not primarily the result of:

- (a) A visual, hearing, or motor disability;
- (b) Mental retardation;
- (c) Emotional disturbance;
- (d) Cultural factors;
- (e) Environmental or economic disadvantage; or
- (f) LEP.

If the District determines that one of these factors is the primary reason for the child's suspected disability, the District does not identify the child as having a SLD.

VI. INDIVIDUALIZED EDUCATION PROGRAMS (IEPs)

The District ensures that an IEP is developed and implemented for each child with a disability, ages 3 through 21, inclusive, who requires special education and related services and who resides in the district. For all children with disabilities for whom our district is the district of residence, the District is responsible for ensuring that the requirements of 3301-51-07 of the Operating Standards are met regardless of which district, county board of MR/DD, or other educational agency implements the child's IEP.

The meeting to develop an IEP is conducted within 30 days of a decision that a child needs special education and related services.

The initial IEP is developed within whichever of the following time periods is the shortest:

- (a) Within 30 calendar days of the determination that the child needs special education and related services;
- (b) Within 90 days of receiving informed parental consent for an evaluation; or
- (c) Within 120 calendar days of receiving a request for an evaluation from a parent or school district (unless the evaluation team has determined it does not suspect a disability).

The District ensures that the parents receive a copy of the child's IEP at no cost to the parents. The parents may receive a copy of the IEP either at the conclusion of the IEP meeting or within 30 calendar days of the date of the IEP meeting.

A. MEMBERS OF THE IEP TEAM

The IEP team includes:

- (1) The child's parents;
- (2) Not less than one of the child's regular education teachers, if the child is or may be participating in the regular education environment;
- (3) Not less than one special education teacher of the child or, where appropriate, not less than one special education provider of the child;
- (4) A representative of the school district who:
 - a) Is qualified to provide, or supervise the provision of, specially designed instruction to meet the unique needs of children with disabilities;
 - b) Knows the general education curriculum; and
 - c) Knows about the availability of resources of the school district.
- (5) Someone who can interpret the instructional implications of the evaluation results, who may be one of the team noted previously;
- (6) At the discretion of the parents or the school district, other individuals who have knowledge or special expertise regarding the child, including related services personnel as appropriate; and
- (7) The child, whenever appropriate. The child must be invited if a purpose of the meeting is the consideration of postsecondary goals for the child and the transition services needed to assist the child in reaching those goals.

A member of the IEP team, other than the parent and the child if appropriate, is not required to attend an IEP team meeting, in whole or in part, if the parent and the district agree, in writing, that the attendance of that member is not necessary because the member's area of the curriculum or related services is not being modified or discussed at the meeting or portion of the meeting.

B. PARENTAL PARTICIPATION

The District takes steps to ensure that one or both of the parents of a child with a disability are present at each IEP team meeting or are afforded the opportunity to participate, including:

- (1) Notifying the parents of the meeting early enough to ensure that they will have an opportunity to attend; and
- (2) Scheduling the meeting at a mutually-agreed upon time and place.

A Notice to a Parent Regarding an IEP meeting:

- (1) Indicates the purpose, time and location of the meeting and who will be in attendance; and
- (2) Informs the parents of the provisions of the Operating Standards regarding the participation of other individuals who have knowledge or special expertise about the child and the participation of the Part C service coordinator or other representatives of the part C system at the initial IEP team meeting for a child previously served under Part C. See 3301-51-07(J)(2)(a)(ii) of the Operating Standards.

Beginning no later than the first IEP to be in effect when the child turns 14, the Notice also:

- (1) Indicates that a purpose of the meeting will be the development of a statement of the transition needs of the child; and
- (2) Indicates that the District will invite the child.

Beginning no later than the first IEP to be in effect when the child turns 16, the Notice also:

- (1) Indicates that a purpose of the meeting will be the consideration of the postsecondary goals and transition services for the child;
- (2) Indicates that the school district will invite the child; and
- (3) Identifies any other agency that will be invited to send a representative, if the parents consent.

The District conducts IEP team meetings without a parent in attendance only if it cannot convince parents that they should attend. Before an IEP team meeting is held without a parent, the District makes multiple attempts to contact a parent to arrange a mutually agreed on time and place, and records its attempts to do so.

C. CONTENTS OF AN IEP

The District uses ODE's required form, PR-O7, for its IEPs.

In developing each child's IEP, the IEP team considers:

- (1) The strengths of the child;

- (2) The concerns of the parents for enhancing the education of their child;
- (3) The results of the initial or most recent evaluation of the child;
- (4) The results of the child's performance on any state or district-wide assessment programs, as appropriate; and
- (5) The academic, developmental and functional needs of the child.

Further, the IEP team considers the following special factors:

- (1) In the case of a child whose behavior impedes the child's learning or that of others, the use of positive behavioral interventions and supports, and other strategies, to address that behavior;
- (2) In the case of a child with LEP, the language needs of the child as those needs relate to the child's IEP;
- (3) In the case of a child who is blind or visually impaired, the instruction of that child in accordance with the Operating Standards and section 3323.011 of the Revised Code;
- (4) The communication needs of the child, including those of a child who is deaf or hard of hearing; and
- (5) Whether the child needs assistive technology devices and services.

(1) CONTENTS OF EVERY IEP

The District's IEPs are written, and are developed, reviewed and revised in IEP meetings. The District's IEPs include all of the following:

- (a) A statement that discusses the child's future and documents planning information;
- (b) A statement of the child's present levels of academic and functional performance, including:
 - (1) How the child's disability affects the child's involvement and progress in the general education curriculum (i.e., the same curriculum as for nondisabled children); or
 - (2) For preschool children, as appropriate, how the disability affects the child's participation in appropriate activities;
- (c) A statement of measurable annual goals, including academic and functional goals and benchmarks or short-term objectives designed to:
 - (1) Meet the child's needs that result from the child's disability to enable the child to be involved in and make progress in the general education curriculum; and
 - (2) Meet each of the child's other educational needs that result from the child's disability;
- (d) A description of:
 - (1) How the child's progress toward meeting the annual goals described in the IEP will be measured; and
 - (2) When periodic reports on the progress the child is making toward meeting the annual goals will be provided;
- (e) A statement of the special education and related services and supplementary aids and services, based on peer-reviewed research to the extent practicable, to be provided to the child, or on behalf of the child, and a statement of the program modifications or supports for school personnel that will be provided to enable the child:
 - (1) To advance appropriately toward attaining the annual goals;

- (2) To be involved in and make progress in the general education curriculum in accordance with the Operating Standards, and to participate in extracurricular and other nonacademic activities; and
- (3) To be educated and participate with other children with disabilities and nondisabled children, as appropriate, in the activities described in 3301-51-07(H)(1)(e) of the Operating Standards;
- (f) An explanation of the extent, if any, to which the child will not participate with nondisabled children in the regular classroom and in activities;
- (g) A statement of any individual appropriate accommodations that are necessary to measure the academic achievement and functional performance of the child on state and districtwide assessments consistent with Section 612(a)(16) of the IDEA;
- (h) If the IEP team determines that the child must take an alternate assessment instead of a particular regular state or districtwide assessment of student achievement, a statement of why:
 - (1) The child cannot participate in the regular assessment; and
 - (2) The particular alternate assessment selected is appropriate for the child; and
- (i) The projected date for the beginning of the services and modifications described in the IEP and the anticipated frequency, location and duration of those services and modifications.

(2) TRANSITION SERVICES

The District’s IEPs address transition services as follows:

- (a) For children age 14 or over (or younger, if determined appropriate by the IEP team), the IEP includes a statement, updated annually, of the transition service needs of the child under the applicable components of the child's IEP that focuses on the child's courses of study (such as participation in advanced-placement courses or a vocational education program.); and
- (b) Beginning not later than the first IEP to be in effect when the child turns 16 (or younger if determined appropriate by the IEP team), the IEP includes:
 - (1) Appropriate measurable postsecondary goals based upon age-appropriate transition assessments related to training, education, employment and, where appropriate, independent living skills; and
 - (2) The transition services (including courses of study) needed to assist the child in reaching those goals.

(3) TRANSFER OF RIGHTS AT AGE OF MAJORITY

Beginning not later than one year before the child reaches 18 years of age, the IEP includes a statement that the child has been informed of the child's rights under Part B of the IDEA that will transfer to the child on reaching the age of majority.

(4) NONACADEMIC SERVICES, PHYSICAL EDUCATION, EXTENDED SCHOOL YEAR AND TRANSPORTATION

If appropriate, the IEP includes the services to be provided in each of these areas.

D. REVIEW AND AMENDMENT OF AN IEP

The District ensures that the IEP team:

- (1) Reviews the child's IEP periodically, but not less than annually, to determine whether the annual goals for the child are being achieved; and
- (2) Revises the IEP, as appropriate, to address:
 - (a) Any lack of expected progress toward the annual goals and in the general education curriculum;
 - (b) The results of any reevaluation;
 - (c) Information about the child provided to, or by, the parents as part of an evaluation or reevaluation;
 - (d) The child's anticipated needs; or
 - (e) Other matters; and
- (3) Reconvenes if an agency, other than the school district, fails to provide the transition services described in the IEP.

Changes to the IEP may be made either at an IEP team meeting, or by a written document amending or modifying the IEP, if the parent of the child and the District agree not to convene an IEP team meeting for the purposes of making those changes. If the IEP is amended by written document, without a meeting of the IEP team, the District ensures that the IEP team is informed of the changes made. When an IEP is amended, the District sends a copy of the amended IEP to the parent within thirty days of the date the IEP was amended.

VII. LEAST RESTRICTIVE ENVIRONMENT (LRE)

The District ensures that, to the maximum extent appropriate, children with disabilities, including children in public or nonpublic institutions or other care facilities, are educated with children who are nondisabled. Placement of students with disabilities in special classes, separate schooling or other removal from the regular educational environment occurs only if the nature or severity of the disability is such that education in regular classes with the use of supplementary aids and services, modifications and/or accommodations cannot be achieved satisfactorily.

The District ensures that a continuum of alternative placements is available to meet the needs of children with disabilities for special education and related services in the least restrictive environment (LRE).

The District determines the placement of a child with a disability at least annually, and the placement is based on the child's IEP, and is as close as possible to the child's home.

Unless the IEP of a child with a disability requires some other arrangement, the child is educated in the school that the child would attend if nondisabled.

In selecting the LRE for a child with a disability, the IEP team considers any potential harmful effect on the child or on the quality of the services that the child needs.

A child with a disability is not removed from education in age-appropriate regular classrooms solely because of needed modifications in the general education curriculum.

VIII. PARENTALLY PLACED NONPUBLIC SCHOOL CHILDREN

A. CHILD FIND

(1) GENERALLY

The District locates, identifies and evaluates all children with disabilities who are enrolled by their parents in chartered and nonchartered nonpublic schools, including religious elementary and secondary schools located within the District's geographical boundaries.

The District consults with the nonpublic school representatives and representatives of parents of parentally placed nonpublic school children with disabilities regarding the child find process, including:

- (a) How parentally placed nonpublic school children suspected of having a disability can participate equitably; and
- (b) How parent, teachers and nonpublic school officials will be informed of the child find process.

After timely and meaningful consultation with representatives of nonpublic schools, the District carries out child find activities for parentally placed nonpublic school children, including children whose parents live out-of-state. These activities are similar to the child find activities the District conducts for its public school children and ensures an accurate count of children with disabilities. The District completes these activities in a time period comparable to that for children attending its public schools, including completing any evaluations within 60 days of receiving parental consent. See Chapter V, Section A(1).

The District follows all IDEA and FERPA confidentiality requirements when serving children with disabilities attending nonpublic schools located within the District's boundaries and obtains parental consent before releasing any personally identifiable information about a child to officials of the child's district of residence or the nonpublic school in which the child is enrolled.

The District conducts, either directly or through contract, a full and individual initial evaluation of any parentally placed nonpublic school child suspected of having a disability who is enrolled in a nonpublic school within the District's boundaries. The District obtains written parental consent before conducting an initial evaluation.

- (a) If the parents of a parentally placed nonpublic school child do not provide consent or fail to respond to the District's request for consent to evaluate the child, the District may not use mediation or due process procedures to pursue the evaluation. The District does not have to consider this child as eligible for services.
- (b) If the parents do not make clear their intent to keep their child enrolled in the nonpublic school, the District provides the parents of a child who is determined to be eligible for special education services written documentation stating that the child's school district of residence is responsible for making FAPE available to the child.

- (c) The District sends a copy of this documentation to the child's district of residence, provided the District obtains written parental consent to release the information.

The District conducts reevaluations of parentally placed nonpublic school children with disabilities receiving special education and any related services to determine continued eligibility for services. The District conducts reevaluations no more than once a year, unless the parents and the District agree otherwise, and at least once every three years, unless the parents and the district agree that a reevaluation is unnecessary.

(2) AUTISM SCHOLARSHIP PROGRAM PARTICIPANTS

The District assumes responsibility for the initial evaluations and re-evaluations of children who reside in the District and desire to participate in the Autism Scholarship Program. The district where the nonpublic school is located conducts all reevaluations for children with disabilities participating in the Autism Scholarship Program. (See 3301-51-08(R)(1) of the Operating Standards). The District creates the IEP that is required for eligible children who reside within the District to participate in the Autism Scholarship Program.

B. CONSULTATION

The District consults with nonpublic school representatives and representatives of parents who have placed their children with disabilities in nonpublic schools in a timely and meaningful way during the design and development of special education and related services for the children regarding the following:

(1) CHILD FIND

See above requirements.

(2) PROPORTIONATE SHARE OF FUNDS

- (a) The determination of the proportionate share of federal IDEA Part B funds available to serve parentally-placed nonpublic school children with disabilities;
- (b) The determination of how the proportionate share of those funds was calculated; and
- (c) Consideration of the number of children and their needs and location.

“Proportionate share” refers to the amount of federal IDEA Part B funds the District must expend to provide the group of parentally-placed nonpublic school children with disabilities with equitable participation in services funded with federal IDEA Part B funds. The District follows the formula in 3301-51-05(E)(1)–(4) of the Operating Standards to calculate the proportionate amount.

(3) CONSULTATION PROCESS

- (a) How the consultation process will bring together District representatives, nonpublic school officials and representatives of parentally placed nonpublic school children with disabilities;

- (b) How the process will take place throughout the school year to ensure that parentally-placed nonpublic school children with disabilities identified through the child find can meaningfully participate in special education and related services.

(4) PROVISION OF SPECIAL EDUCATION AND RELATED SERVICES

- (a) How, where and by whom special education and related services will be provided;
- (b) The types of services, including direct services and alternate service delivery mechanisms;
- (c) How special education and related services will be apportioned if funds are insufficient to serve all parentally placed nonpublic school children; and
- (d) How and when these decisions will be made.

(5) WRITTEN EXPLANATION BY THE SCHOOL DISTRICT

How the District will provide the nonpublic school officials a written explanation of the reasons why the District chose not to provide services directly or through a contract if the District disagrees with the views of the nonpublic school officials on the provision of services or the types of services.

The District obtains a written affirmation signed by representatives of the participating nonpublic schools that timely and meaningful consultation has occurred. If representatives of the participating nonpublic schools do not provide the affirmation within a reasonable period of time or choose not to participate under the proportionate share provisions of IDEA and engage in consultation, the District documents its consultation attempts and forwards the documentation to the ODE-OEC. If a nonpublic school located within the boundaries of the District chooses not to participate, the parents may contact the District to request services for the child.

C. RIGHTS TO SERVICES

The District is not required to pay for the cost of education, including special education and related services, of a child with a disability, enrolled at a nonpublic school or facility if:

- (1) The child's district of residence made FAPE available to the child; and
- (2) The parents elected to place the child in the nonpublic school.

The District includes these children and their needs in the population being considered when making decisions about services to be provided to parentally placed nonpublic school children with disabilities.

If the parents make clear their intention to keep their child with a disability enrolled in the nonpublic school, the child's district of residence does not need to develop an IEP for the child. If the child with a disability re-enrolls in the District, the District makes FAPE available.

D. EQUITABLE SERVICES DETERMINED

The District makes the final decisions about the services to be provided through a services plan to eligible parentally placed nonpublic school children with disabilities who are attending

nonpublic schools within the District's geographic boundaries. The District makes these decisions after consultation with nonpublic school representatives and parents of parentally placed nonpublic school children and through meetings to develop, review and revise services plans. A child with a disability attending a nonpublic school does not have an individual right to receive some or all of the special education and related services that the child would receive if enrolled in a public school.

E. EQUITABLE SERVICES PROVIDED

(1) THE SERVICES PLAN

- (a) The District, whether or not it is the child's school district of residence, convenes the services plan meeting, conference call, or video conference for each eligible child who will receive special education and any related services for children who attend nonpublic schools located within the District's geographical boundaries.
- (b) The District determines required participants at the services meeting.
- (c) The District ensures that a nonpublic school representative participates in the development or revision of the services plan.
- (d) The District conducts a meeting, conference call, or video conference at least annually to review and revise, if appropriate, each child's services plan.
- (e) The District uses the ODE required Services Plan PR-09 form for individually developing a services plan for each participating child that describes the specific special education and related services that the District will provide to the child. Parentally placed nonpublic school children with disabilities may receive a different amount of services than children with disabilities enrolled in the District.

(2) PROVISION AND LOCATION OF SERVICES

- (a) District personnel provide services to parentally placed nonpublic school children who attend nonpublic schools located within the District's geographical boundaries or the District provides services through a contract with an individual, association, agency, organization or other entity.
- (b) The District ensures that special education and related services, including materials and equipment, provided to parentally placed nonpublic school children with disabilities are secular, neutral and non-ideological.
- (c) The District, in consultation with the nonpublic school, will determine where services will be provided. Services may be provided on or off the premises of the nonpublic school. The District may provide services at the nonpublic school with the permission of that school.

(3) TRANSPORTATION

- (a) The District provides transportation to parentally placed nonpublic school children with disabilities who attend nonpublic schools located within the District's geographical boundaries if the services being provided under IDEA are being delivered at a location other than the nonpublic school the child is attending. The District provides transportation:
 - (1) From the child's nonpublic school or the child's home to the site other than the nonpublic school; and

- (2) From the service site to the nonpublic school or to the child' home depending on the timing of the services;
- (b) The District may include the cost of transportation to special education and related services that are being delivered at a location other than the nonpublic school in calculating whether it has met the requirements of spending a proportionate amount of federal funds that it receives to serve children with disabilities; and
- (c) The District provides transportation to all children, with and without disabilities, who reside within the District and who are parentally placed in chartered nonpublic schools following the requirements in ORC 3327.01.

F. DUE PROCESS COMPLAINTS AND COMPLAINTS TO ODE

Due process rights do not apply to the provision of special education and related services the District has agreed to provide through a services plan. However, the parents of a child with a suspected disability, or a child identified as having a disability, who is enrolled in a nonpublic school, have the right to file a due process complaint against the District where the nonpublic school is located regarding that District's failure to meet the child find requirements, including location, identification, evaluation and reevaluation of the child.

If the District receives a due process complaint requesting a due process hearing from the parents of parentally placed nonpublic school child, the District follows the procedures that apply to other due process complaints.

The parents of a child with a disability, who has been unilaterally placed in a nonpublic school, have the right to file a formal written complaint with ODE-OEC regarding a number of different issues, which are listed in 3301-51-08(L)(3) of the Operating Standards.

APPENDIX A

**When to Provide
Prior Written Notice, Informed Consent and Procedural Safeguards Notice (*Whose IDEA Is This?*)**

Steps in the Special Education Process	Action Required		
	Notification or Informed Consent	Prior Written Notice to Parents PR-01	Whose IDEA Is This?
1. Procedural safeguards must be provided to the parents once a year			X
2. Procedural safeguards must be provided upon request of the parents			X
3. Initial referral for a suspected disability		X	X
4. Initial evaluation	Informed consent (Parent Consent for Evaluation PR-04 form)	X	
5. Eligibility determination		X	
6. IEP meeting	Notification (Parent Invitation to Meeting PR-02 form)	Provide after an IEP, if parents do not agree or do not attend the meeting	
7. Reevaluation with assessments conducted	Informed consent (Parent Consent for Evaluation PR-04 form)	Provide before, and after if parents do not agree or disability category changes	
8. Reevaluation without further assessments conducted	Notification	May use this form to notify before, and provide after, if parents do not agree or disability category changes	
9. No reevaluation conducted		X	
10. Transfers from out of state and out of district	Informed consent (Parent Consent for Evaluation PR-04 form) (If an evaluation is to be conducted)	Provide only after an IEP, if parents do not agree	If moved from out of state
11. Change of placement	Informed consent (IEP PR-07 form)	Provide only after an IEP, if parents do not agree	
12. Change in the type and amount of services		Provide only after an IEP, if parents do not agree	
13. Exit from special education	Notification (Summary of performance if graduating or aging out of special education)	X	
14. District refuses services requested by parents		X	
15. District proposes/refuses to change disability category		X	
16. Releasing personally identifiable information	Informed consent (written consent)		
17. Destruction of personally identifiable information	Notification prior to destruction		
18. Transfer of parental rights	Statement included in IEP PR-07 form		X
19. Upon receipt of the first due process complaint or upon receipt of first state complaint in school year			X
20. Disciplinary change in placement		X	X
21. Revocation of consent		X	

Prior Written Notice, Informed Consent and Procedural Safeguards Notice (*Whose IDEA Is This?*)

- 1. Procedural safeguards must be provided to the parents once a year.**
 The school district must give a copy of the **procedural safeguards notice (*Whose IDEA Is This?*)** to the parents at least once a year, except as noted below:

 - Upon initial referral or the parents request for evaluation;
 - Upon request by the parents;
 - Upon receipt of the first due process complaint or state complaint in a school year; and
 - Upon a change in placement for disciplinary action.

- 2. Procedural safeguards must be provided upon request of the parents.**
 The school district must give a copy of the **procedural safeguards notice (*Whose IDEA Is This?*)** to the parents whenever the parents request.

- 3. Initial referral for a suspected disability**
 On the date of the referral, the district must provide the parents with a copy of the **procedural safeguards notice (*Whose IDEA Is This?*)**. For a parental referral, the date of referral is the date that the district received either the verbal or written request from the parents to conduct an evaluation. For a district referral, the date of referral is the date that the screening or review team decided an evaluation should be conducted. See Evaluation – 6.2 Request and Referral for Initial Evaluation. Within 30 days of the date of initial referral by the parents for a suspected disability, the district must provide the **Prior Written Notice to Parents PR-01** form to the parents if the district does not suspect a disability.

- 4. Initial evaluation**
 Within 30 days of the date of initial referral by the parents for a suspected disability, the district must provide the **Prior Written Notice PR-01** form to the parents and receive written, **informed consent (Parent Consent for Evaluation PR-04 form)** from the parents prior to conducting any assessments as part of an initial evaluation. A description of any evaluation procedures the district proposes to conduct must also be provided to the parents. (If the notice relates to an action proposed by the district that also requires parental consent, the district may give notice at the same time it requires parental consent.)

- 5. Eligibility determination**
 If the evaluation team determines that a child is not eligible for special education and related services the district will provide the parents the **Prior Written Notice to Parents PR-01** form once this determination is made. If the evaluation team determines that a child is eligible for special education and related services, see Item number 6, IEP Meeting.

- 6. IEP Meeting**
 The district must use the required **Parent Invitation PR-02** form to notify and invite the parents to an IEP meeting. Districts must take steps to ensure that one or both parents are present at each IEP meeting or are afforded the opportunity to participate. This requires that the district:

 - Notify the parents of the IEP meeting early enough to ensure that they have an opportunity to attend; and
 - Schedule the meeting at a mutually agreed upon time and place.

A district must provide the **Prior Written Notice to Parents PR-01** form after an IEP meeting, if the parents do not agree with the IEP or any portion of the IEP or do not attend the meeting.

A district must provide **prior written notice** to the parents and receive **written, informed consent** from the parents before the initial placement of a child in special education. The **IEP PR-07** form serves as prior written notice unless the parents disagree with the IEP. Written informed consent to initiate special education and related services is provided through the parents' signature on the IEP form.

7. **Reevaluation with assessments conducted**

A district must provide the **Prior Written Notice to Parents PR-01** form and obtain **informed parental consent (Parent Consent for Evaluation PR-05 form)** before conducting any tests or assessments as part of a reevaluation of a child with disabilities, unless the district has provided notice and the parents have failed to respond to reasonable attempts to obtain consent.

The district must provide the **Prior Written Notice to Parents PR-01** form after the reevaluation is completed, if the parents disagree with the reevaluation or the reevaluation results in a change in the child's disability category.

8. **Reevaluation without further assessments conducted**

If the evaluation team determines that no additional data are needed to determine that the child continues to be a child with a disability and to determine the child's educational needs, the evaluation team must notify the child's parents. The notification that no further assessments are necessary must include:

- The team's determination and the reasons for the determination; and
- The parents' right to request an assessment to determine whether the child continues to be a child with a disability and to determine the child's educational needs.

The **Prior Written Notice to Parents PR-01** form may be used for this notification as long as it includes the information listed directly above.

The district must provide the **Prior Written Notice to Parents PR-01** form after the reevaluation is completed, if the parents disagree with the reevaluation or the reevaluation results in a change in the child's disability category.

9. **No reevaluation conducted**

If the IEP team, including the parents, agrees that a reevaluation of a child is unnecessary, the district must provide the **Prior Written Notice to Parents PR-01** form.

10. **Transfers from out of state and out of district**

Upon the enrollment of a child with an existing IEP from another district or state, the district must convene the IEP team and determine if the team will accept the existing IEP or change the existing IEP. If the parents disagree with the IEP team on the IEP that will be implemented by the district, the **Prior Written Notice to Parents PR-01** form must be provided to the parents. See [IEP – 7.1 General](#).

Transfers from out of state

If the child moved into the district from another state, the district must provide the parents with a copy of the **procedural safeguards notice (Whose IDEA Is This?)**.

If the district determines that a new evaluation is necessary for a child who transfers from out of state, the evaluation is considered an initial evaluation and the district must provide the **Prior Written Notice to Parents PR-01** form and obtain written parental consent (**Parent Consent for Evaluation PR-05 form**). See [Evaluation – 6.2 Request and Referral for Initial Evaluation](#).

Transfers from out of district

If the child transfers into the district from another district in the state, the district provides the parents with a copy of the **procedural safeguards notice (Whose IDEA Is This?)** if the sending school district had not provided the parents with a copy during the current school year.

If the IEP team refers a child who transfers from another district in the state for additional evaluation, the evaluation is considered to be a reevaluation. The district must provide the **Prior Written Notice to the Parents PR-01** form and obtain written parental consent (**Parent Consent for Evaluation PR-05** form). See Evaluation – 6.5 Reevaluation.

11. Change of placement

The district must provide the **Prior Written Notice to Parents PR-01** form after an IEP meeting, if the parents do not agree with the IEP team's proposed change of placement on the continuum of alternative placement options. The district may not change the child's placement until the parents consent to the proposed change of placement.

12. Change in the type and amount of services

The district must provide the **Prior Written Notice to Parents PR-01** form after an IEP meeting, if the parents do not agree with the changes in the types and amount of services being proposed. The district may then proceed to implement the IEP.

13. Exit from special education

The district must provide the **Prior Written Notice to Parents PR-01** form whenever a child exits special education. In addition, for a child whose eligibility for special education terminates because the child is graduating with a regular diploma or exceeding the age eligibility for special education, the school district must provide the child with a **summary of the child's academic achievement and functional performance**, which shall include recommendations on how to assist the child in meeting the child's postsecondary goals.

14. District refuses services requested by parents

The district must provide the **Prior Written Notice to Parents PR-01** form to the parents any time the district refuses the request of the parents to provide special education and related services to the child.

15. District proposes/refuses to change disability category

The district must provide the **Prior Written Notice to Parents PR-01** form to the parents any time the district proposes or refuses to change the child's disability category. The ETR and the documentation of eligibility can be considered a prior written notice if all the elements required in a prior written notice are present in the ETR and determination of eligibility.

16. Releasing personally identifiable information

The district must obtain **written parental consent** prior to releasing any personally identifiable information about the child to any person or agency not entitled by law to see it, and to a representative of any participating agency that is likely to be responsible for providing or paying for transition services.

17. Destruction of personally identifiable information

The school district must inform the parents when personally identifiable information collected, maintained and used is no longer needed to provide educational services to the child. The information must be destroyed at the request of the parents. However, a permanent record of a child's name, address, telephone number, grades, attendance record, classes attended, grade level completed and year completed shall be maintained without time limitation. This **notification may be in writing or provided verbally**. If provided verbally, the school district should document this notification in the child's education record.

18. Transfer of parental rights

One year before the child's 18th birthday, the district must notify both the child and the parents of the parental rights, under Part B, that will transfer to the child upon reaching the age of majority. The district also must provide the child with a copy of the **procedural safeguards notice (Whose IDEA Is This?)**. This notification is documented on the child's **IEP PR-07** form.

19. Upon receipt of the first due process complaint or upon receipt of the first state complaint in the school year

The school district must give the parents a copy of the **procedural safeguards notice (Whose IDEA Is This?)** upon receipt of the parents' first due process request. The Ohio Department of Education, Office for Exceptional Children gives the parents a copy of the **procedural safeguards (Whose IDEA Is This?)** upon the parents' filing of the first state complaint within the school year.

20. Disciplinary change in placement

Whenever a change of placement occurs due to disciplinary action, a copy of the **procedural safeguards notice (Whose IDEA Is This?)** and **Prior Written Notice PR-01** form must be provided.

21. Revocation of consent (must be in writing)

The district must provide the **Prior Written Notice to Parents PR-01** form if the parents of a child with a disability revoke consent in writing for the continued provision of all special education and related services. This notice must include:

- A summary of all of the supports and services the child will no longer receive, and any change in educational placement that will occur as a result of the revocation of consent.
- Statements that once the revocation takes effect, the district will not be considered to be in violation of its requirement to make FAPE available, is not required to convene an IEP meeting or develop an IEP, is not required to conduct a three year reevaluation, is not required to offer the child the discipline protections available under IDEA and is not required to amend the child's education records to remove any reference to the child's receipt of special education and related services.
- A statement that by revoking consent for special education and related services for the child, the parent is not waiving the right to request an initial evaluation or to receive services in the future.



SPECIAL EDUCATION MODEL POLICIES AND PROCEDURES

Adopted on:

12-13-2023

Date

By:

The Intergenerational School
District

July 1, 2009

INTRODUCTION

By adopting these Model Policies and Procedures, the _____ (the “District”) is adopting written policies and procedures regarding the manner in which the District fulfills its obligations under the Individuals with Disabilities Education Improvement Act of 2004 (IDEA) and the *Ohio Operating Standards for Ohio Educational Agencies Serving Children with Disabilities* (hereafter referred to as the “Operating Standards”). The Operating Standards require that the District adopt written policies and procedures in a number of different areas, and the District has chosen to adopt the model policies and procedures promulgated by the Ohio Department of Education’s Office for Exceptional Children (ODE-OEC) in order to satisfy these requirements of the Operating Standards.

This document, while comprehensive, does not include every requirement set forth in the IDEA, the regulations implementing IDEA, the Operating Standards, the Ohio Revised Code (ORC) and/or the Ohio Administrative Code (OAC). The District recognizes its obligation to follow these laws, regardless of whether their provisions are restated in the Model Policies and Procedures.

I. FREE APPROPRIATE PUBLIC EDUCATION (FAPE)

The District ensures that a free appropriate public education (FAPE) is made available to all children with disabilities between the ages of 3 and 21, inclusive, in accordance with IDEA and the Operating Standards.

A. RESIDENTIAL PLACEMENT

If the District places a child with a disability in a public or private residential program deemed necessary to provide special education and related services to a child with a disability, the program, including non-medical care and room and board, is at no cost to the parents of the child.

B. ASSISTIVE TECHNOLOGY

The District makes assistive technology available if required as part of the child's special education, related services or supplementary aids and services.

C. EXTENDED SCHOOL YEAR (ESY) SERVICES

The District ensures that extended school year services are provided if a child's individualized education program (IEP) team determines that the services are necessary for the provision of FAPE to the child. If a child is transitioning from Part C services, the District considers extended school year (ESY) services as part of the IEP process.

D. NONACADEMIC SERVICES

The District takes steps, including the provision of supplementary aids and services determined appropriate and necessary by the child's IEP team, to provide nonacademic and extracurricular services and activities in the manner necessary to afford children with disabilities an equal opportunity for participation in those services and activities as provided to students without disabilities.

Nonacademic and extracurricular services and activities include counseling services, athletics, transportation, health services, recreational activities, special interest groups or clubs sponsored by the school district, referrals to agencies that provide assistance to individuals with disabilities and employment of students, including both employment by the school district and assistance in making outside employment available.

E. PROGRAM OPTIONS AND PHYSICAL EDUCATION

The District takes steps to ensure that children with disabilities served by the District have available to them the variety of educational programs and services available to nondisabled

children served by the school district, including art, music, industrial arts, consumer and homemaking education and vocational education.

The District ensures that a child with a disability receives appropriate physical education services. The District affords each child with a disability the opportunity to participate in a regular physical education program available to non-disabled children, unless the child is enrolled full time in a separate facility or needs specially designed physical education, as prescribed in the child's IEP. The District provides a specially designed physical education program if prescribed by the IEP.

For preschool children, the District considers adapted physical education or related services, as appropriate, in conjunction with center-based or itinerant teacher services, and considers the factors set forth in 3301-51-11(F) of the Operating Standards.

F. TRANSPORTATION

The District provides, as a related service, transportation service in accordance with IDEA and the Operating Standards.

II. CONFIDENTIALITY

The District safeguards the confidentiality of personally identifiable information at use, collection, storage, retention, disclosure and destruction stages. In the District, _____ (name of responsible official) is responsible for maintaining the confidentiality of personally identifiable information. The District ensures that all persons collecting or using personally identifiable information receive training and instruction regarding the District's policies regarding that information. The District maintains for public inspection a current listing of the names and positions of those employees within the agency who may have access to personally identifiable information. The District gives notice to all parents of students receiving special education and related services that is adequate to fully inform parents about confidentiality requirements, in accordance with 3301-51-04(C) of the Operating Standards. The District also ensures that its contractors adhere to applicable confidentiality requirements.

A. ACCESS RIGHTS

The District permits parents (or a representative of a parent) to inspect and review any education records relating to their children that are collected, maintained, or used by the District. If any education record includes information on more than one child, the parents of those children have the right to inspect and review only the information relating to their child or to be informed of that specific information. The District does not charge a fee to search for or retrieve information. The District may charge a fee for copies of records, but does not charge a fee for copies of records that will effectively prevent the parents from exercising their right to inspect and review records.

The District complies with a request to access records without unnecessary delay and before any meeting regarding an IEP, or any hearing pursuant to 3301-51-05 of the Operating Standards, and any resolution session pursuant to 3301-51-05 of the Operating Standards, and in no case more than 45 days after the request has been made.

The District responds to reasonable requests for explanations and interpretations of the records, provides copies if failure to provide copies would effectively prevent the parent from exercising the right to inspect and review the records and permits a representative of a parent to inspect and review records.

The District presumes that a parent has the authority to inspect and review records relative to that parent's child unless the District has been advised that the parent does not have the authority under applicable state law governing such matters as guardianship, separation and divorce.

Upon request, the District provides parents a list of the types and locations of education records collected, maintained or used by the District.

The District keeps a record of parties obtaining access to education records collected, maintained or used under Part B of the IDEA (except access by parents and authorized employees of the

participating agency), including the name of the party, the date access was given and the purpose for which the party is authorized to use the records.

B. AMENDMENT OF RECORDS/HEARING PROCESS

If a parent requests the District to amend the information in the education records collected, maintained or used in the provision of special education or related services, the District decides whether to amend the information in accordance with the request within a reasonable period of time. If the District decides to refuse to amend the information in accordance with the request, it informs the parent of the refusal and advises the parent of the right to a hearing as set forth below and in 3301-51-04 of the Operating Standards.

(1) HEARING PROCEDURE

If the parent requests a hearing to challenge information in education records, the hearing is conducted in accordance with the procedures in 34 Code of Federal Regulations (C.F.R.) 99.22 (July 1, 2005) and within a reasonable period of time after the District receives the request. The hearing is conducted in accordance with the following procedures:

- (a) The parents shall be given notice of the date, time and place reasonably in advance of the hearing;
- (b) The records hearing shall be conducted by any individual, including an official of the District, who does not have a direct interest in the outcome of the hearing;
- (c) The parents shall be afforded a full and fair opportunity to present evidence relevant to the child's education records and the information the parent believes is inaccurate or misleading or violates the privacy or other rights of the child;
- (d) The parents may, at their own expense, be assisted or represented by one or more individuals of their choice, including an attorney;
- (e) The District makes its decision in writing within a reasonable period of time after the hearing; and
- (f) The decision is based solely upon the evidence presented at the hearing and includes a summary of the evidence and the reasons for the decision.

(2) RESULTS OF HEARING

If the District, as a result of the hearing, decides that the information is inaccurate, misleading or otherwise in violation of the privacy or other rights of the child, it amends the information accordingly and informs the parent in writing.

If the District, as a result of the hearing, decides that the information is not inaccurate, misleading or otherwise in violation of the privacy or other rights of the child, it must inform the parent of the parent's right to place in the child's records a statement commenting on the information or setting forth any reasons the parents disagree with the decision of the District.

Any explanation placed in the records of a child are:

- (a) Maintained by the District as part of the records of the child as long as the record or contested portion is maintained by the District; and

- (b) Disclosed any time the records of the child or the contested portion is disclosed by the District to any party.

C. PARENTAL CONSENT PRIOR TO DISCLOSURE OF RECORDS

The District obtains parental consent before personally identifiable information is disclosed to parties, other than officials of participating agencies in accordance as defined by 3301-51-04(B)(3) of the Operating Standards, unless the information is contained in education records and the disclosure is authorized without parental consent under the Family Educational Rights and Privacy Act of 1974, August 1974, 20 U.S.C. 1232g (FERPA).

The parent's consent must be in writing, signed and dated and must:

- (1) Specify the records to be disclosed;
- (2) State the purpose of the disclosure; and
- (3) Identify the party or class of parties to whom the disclosure may be made.

The District obtains parental consent, or the consent of an eligible child who has reached the age of majority under Ohio law, before personally identifiable information is released:

- (1) To officials of participating agencies providing or paying for transition services in accordance with 3301-51-07 of the Operating Standards;
- (2) To officials in another district or school in connection with the child's enrollment in a nonpublic school; and/or
- (3) For purposes of billing insurance and/or Medicaid.

D. TRANSFER OF RIGHTS AT AGE OF MAJORITY

The District affords rights of privacy to children similar to those afforded to parents, taking into consideration the age of the child and type or severity of disability.

The rights of parents regarding education records under FERPA transfer to the child at age 18.

If the rights accorded to parents under Part B of the IDEA are transferred to a child who reaches the age of majority (which is 18 in Ohio), the rights regarding education records also transfer to the child. See Chapter IV, Procedural Safeguards, Section G, regarding the transfer of rights under IDEA at the age of majority.

Once a child reaches the age of 17, the IEP must include a statement that the child has been informed regarding this transfer of rights.

E. DISCIPLINARY INFORMATION AND REPORTS TO LAW ENFORCEMENT

The District includes in the records of a child with a disability a statement of any current or previous disciplinary action that has been taken against the child and transmits the statement to

the same extent that disciplinary information is included in, and transmitted with, the records of nondisabled children.

When a child transfers from the District, the transmission of any of the child's records includes both the child's current IEP and any statement of current or previous disciplinary action that has been taken against the child.

A statement of disciplinary action shall:

- (1) Specify the circumstances that resulted in the disciplinary action and provide a description of the disciplinary action taken if the disciplinary action was taken because the child:
 - (a) Carried a weapon to or possessed a weapon at school, on school premises or to or at a school function;
 - (b) Knowingly possessed or used illegal drugs, or sold or solicited the sale of a controlled substance, while at school, on school premises or at a school function; or
 - (c) Inflicted serious bodily injury upon another person while at school, on school premises or at a school function; and
- (2) Include any information that is relevant to the safety of the child and other individuals involved with the child.

A statement of disciplinary action may include a description of any other behavior engaged in by the child that required disciplinary action, and a description of the disciplinary action taken.

If the District reports a crime to the appropriate law enforcement officials, the District transmits copies of the special education and disciplinary records of the child to those officials only to the extent that the transmission is permitted by FERPA and any other applicable laws.

F. DESTRUCTION OF RECORDS

The District informs parents when personally identifiable information is no longer needed to provide educational services to the child. If the parents request, the information is then destroyed. However, a permanent record of a student's name, address, telephone number, grades, attendance record, classes attended, grade level completed and year completed is maintained without time limitation.

III. CHILD FIND

In accordance with federal law, the District assumes responsibility for the location, identification and evaluation of all children birth through age 21 who reside within the district and who require special education and related services.

This includes students who are:

- (1) Advancing from grade to grade;
- (2) Enrolled by their parents in private elementary or private secondary schools, including religious schools, located in our District (regardless of the severity of their disability);
- (3) Wards of the state and children who are highly mobile, such as migrant and homeless children; and
- (4) Home-schooled.

A. RESPONSIBILITY FOR DETERMINING ELIGIBILITY

In the District, the Evaluation Team ensures that the student meets the eligibility requirements of IDEA and state regulations.

In all cases, the Evaluation Team will not determine that a student has a disability if the suspected disability is because of a lack of instruction in reading or math. If the student is not proficient in English, the District will not identify the student as disabled if the limited English proficiency (LEP) is the cause of the suspected disability.

B. CHILD IDENTIFICATION PROCESS

(1) GENERAL

The District has a child identification process that includes the location, identification and evaluation of a child suspected of having a disability. _____ (title of individual or department) coordinates the child identification process. The department and its staff use a variety of community resources and systematic activities in order to identify children requiring special services. District staff members consult with appropriate representatives of private school students attending private schools located in the District in carrying out this process. The District ensures that this process for students attending private or religious schools located in the District is comparable to activities undertaken for students with disabilities in the public schools.

(2) IDENTIFICATION OF CHILDREN BETWEEN THE AGES OF BIRTH TO AGE 3.

When the District becomes aware of a child between the ages of birth to 3 who has or may have a disability, it either:

- (a) Makes a child referral directly to the county family and children first council responsible for implementing the “Help Me Grow” (HMG) early intervention services under Part C of the IDEA; and/or

- (b) Provides the parents with the information so that they can make the referral themselves.

Parents may opt out of and/or opt not to be referred for Part C services. They may request an evaluation from the District to determine if their child has a disability that may require special education. These parents are entitled to an evaluation from the District, even if the child is between the ages of birth to 3. The District is responsible for providing an evaluation but is not responsible for the provision of FAPE for an eligible child until the child is age 3.

(3) TRANSITION TO SPECIAL EDUCATION FROM HELP ME GROW (HMG).

The District and the county family and children first council responsible for HMG have a current interagency agreement that includes processes for the referral of children from HMG to the District. The District has an assigned transition contact, _____, who is the primary person responsible for contact with HMG regarding children transitioning from that program.

- (a) If invited by a representative of HMG (and with parent permission), a District representative attends a transition conference to discuss transition from early intervention services to preschool for a child suspected of having a disability.
- (b) If the parents request, the District invites the Part C service coordinator to the initial IEP meeting.

If there is a suspected disability and the child is eligible for special education and related services as a preschool child, the District works to ensure that an IEP is in place and implemented by the child's third birthday. In the case of children who are 45 days or less from their 3rd birthdays and who are suspected of having disabilities, an evaluation is completed within 60 days of parental consent, but an IEP is not required by their third birthdays.

As part of the IEP process, the IEP team determines if extended school year services are required for the preschool child.

(4) COORDINATION WITH OTHER AGENCIES.

The District has interagency agreements with Head Start programs within the school district's service delivery that provide for:

- (a) Service coordination for preschool children with disabilities, 3 through 5 years of age, in a manner consistent with the state interagency agreement for service coordination with Head Start; and
- (b) Transition of children eligible for special education and related services as a preschool child at age 3.

The District also has interagency agreements with the relevant county board(s) of MR/DD for identification, service delivery and financial responsibilities to adequately serve preschool children with disabilities 3 through 5 years of age.

C. DATA COLLECTION

The District maintains an education management information system and submits data to ODE pursuant to rule 3301-14-01 of the Administrative Code. The District's collection of data includes information needed to determine if significant disproportionality based on race and ethnicity is occurring in the District with respect to the identification of children as children with disabilities, the placement of children in educational settings and the incidence, duration and type of disciplinary actions.

IV. Procedural Safeguards

A. PRIOR WRITTEN NOTICE

The District provides prior written notice as required by IDEA and Operating Standards. See Appendix A which summarizes the situations in which prior written notice is required. The District uses the form required by ODE-OEC Prior Written Notice PR-01.

(1) CONTENT OF PRIOR WRITTEN NOTICE

The prior written notice, in accordance with the IDEA regulations and the Operating Standards, includes the following information to ensure that parents are fully informed of the action being proposed or refused:

- (a) A description of the action proposed or refused by the District;
- (b) An explanation of why the District proposes or refuses to take this action;
- (c) A description of other options that the IEP team considered and the reasons why those options were rejected;
- (d) A description of each evaluation procedure, assessment, record or report that the District used as a basis for the proposed or refused action;
- (e) A description of other factors that are relevant to the District's proposal or refusal;
- (f) A statement that the parents of a child with a disability have procedural safeguards and, if the notice is not an initial referral for evaluation, the means by which a copy of the description of procedural safeguards can be obtained; and
- (g) Sources for parents to contact to obtain assistance in understanding the provisions of Ohio's rule regarding procedural safeguards.

(2) COMMUNICATION OF THE PRIOR WRITTEN NOTICE

The District provides the notice in the native language of the parents or other mode of communication used by the parents unless it is clearly not feasible to do so.

If the native language or other mode of communication is not a written language, the District takes steps to have the notice translated orally or by other means to the parent in the parent's native language or other mode of communication. The District takes steps to ensure that such parents understand the content of the notice and maintains written evidence that both requirements set forth in this paragraph, if applicable, have been met.

The District may provide the prior written notice, procedural safeguards notice and the notification of a due process complaint by e-mail if the parents choose to receive the notices electronically.

B. PROCEDURAL SAFEGUARDS NOTICE

Parents of a child with a disability are entitled to specific procedural safeguards under IDEA and the Operating Standards.

Whose IDEA Is This? A Parent's Guide to the Individuals with Disabilities Education Improvement Act of 2004, developed by ODE-OEC, includes a full explanation of these procedural safeguards as required by IDEA and 3301-51-02, 3301-51-04 and 3301-51-05 of the Operating Standards.

The District provides parents with a copy of *Whose IDEA Is This?* at least once a year. This includes:

- (1) Providing a copy to the parents of a child who transfers into the District from out-of-state; and
- (2) Providing a copy to the parents of a child who transfers into the District from an in-state school if the sending District has not provided a copy to the parents during the current school year.

In addition, the District provides parents with a printed copy of this procedural safeguards notice in each of the following circumstances:

- (1) The initial referral or parental request for evaluation;
- (2) The receipt of the first due process complaint in a school year;
- (3) A change in placement for disciplinary action; and
- (4) When requested by the parents or the child who has reached the age of majority.

In providing *Whose IDEA is This?*, the District follows the procedures for communication that are described above under Prior Written Notice.

C. PARENTAL CONSENT

Consent means that the parents:

- (a) Have been fully informed, in the parents' native language or other mode of communication, of all information relevant to the activity for which consent is sought;
- (b) Understand and agree in writing to the carrying out of the activity for which the consent was asked. The consent describes that activity and lists the records (if any) that will be released and to whom they will be released; and
- (c) Understand that the granting of consent is voluntary and may be revoked at any time.

(1) ACTIONS REQUIRING INFORMED WRITTEN PARENTAL CONSENT

The District obtains written consent from the parents before:

- (a) Conducting an initial evaluation to determine if a child is eligible for special education;
- (b) Initially providing special education and related services;
- (c) Conducting a reevaluation when assessments are needed;
- (d) Making a change in placement on the continuum of alternative placement options (i.e., regular classes, special classes, special schools, home instruction and instruction in hospitals and institutions); and
- (e) Releasing personally identifiable information about the child to any person other than a person authorized to obtain those records without parental consent pursuant to FERPA. For example, parental consent is obtained prior to releasing records to a representative of

an agency that is likely to be responsible for providing or paying for transition services or for the purposes of billing Medicaid.

The District uses the ODE-OEC required Consent for Evaluation PR-05 form to obtain written parental consent for evaluation and reevaluation and the required IEP PR-07 form to obtain written parental consent for the initial provision of special education and related services and for making a change in placement.

The District does not obtain written parental consent when reviewing existing data as part of an evaluation or reevaluation or when administering a test or evaluation that is given to all children, unless consent is required of all parents.

(2) CHANGE IN PLACEMENT

Once the District receives the initial parental consent for special education and related services, the District must obtain consent only for a change in placement. A “change of placement” means a change from one option on the continuum of alternative placements to another (instruction in regular classes, special schools, home instruction and instruction in hospitals and institutions).

If the District cannot obtain parental consent, it may file a due process complaint requesting a due process hearing or engage in conflict resolution to obtain agreement or a ruling that the placement may be changed.

(3) PARENTS’ FAILURE TO RESPOND OR REFUSAL TO PROVIDE CONSENT

The District makes “reasonable efforts” to contact parents and obtain written parental consent that may include:

- (a) Written correspondence;
- (b) Phone calls;
- (c) Electronic mail communications, to include but not limited to e-mail and password-protected parent pages; and/or
- (d) Visits to the home or parents’ places of employment.

The District documents its attempts. If the parents fail to respond or refuse to provide consent, the District proceeds as follows:

(4) INITIAL EVALUATION

If the parents fail to respond to the District’s efforts to obtain consent or refuse consent for the initial evaluation, the District may:

- (a) Request a due process hearing and engage in conflict resolution (e.g., resolution meeting and/or mediation) to convince the parents to provide their consent; or
- (b) Decide not to pursue the initial evaluation and provide the parents with prior written notice.

If the child is being home schooled or has been placed in a private school at the parents' expense, the District cannot file a due process complaint or request the parents to participate in a resolution meeting and/or mediation.

(5) REEVALUATION

If the parents fail to respond to the District's efforts to obtain consent for a reevaluation when assessments are needed, the District proceeds with the reevaluation.

If the parents expressly refuse consent for a reevaluation when assessments are needed, the District may:

- (a) Agree with the parents that a reevaluation is unnecessary;
- (b) Conduct a reevaluation by utilizing data and/or documentation that the District already possesses;
- (c) Request a due process hearing and engage in conflict resolution (e.g., resolution meeting and/or mediation) to convince the parents to provide their consent; or
- (d) Decide not to pursue having the child reevaluated.

The District continues to provide FAPE to the child if the District agrees with the parents that a reevaluation is unnecessary.

(6) INITIAL PROVISION OF SPECIAL EDUCATION AND RELATED SERVICES

If the parents do not attend the IEP meeting to develop the IEP for the initial provision of services, the District attempts to obtain written parental consent through other methods such as calling the parents, corresponding with the parents and or visiting the parents.

If the parents expressly refuse consent, as evidenced by their signatures on the IEP indicating that consent is not given, the District maintains a copy of the signed IEP showing that the District offered FAPE.

If the parents fail to respond or refuse consent, the District provides the parents with prior written notice and continues to provide the child with appropriate interventions in the regular education classroom. The District may not request a due process hearing or engage in conflict resolution to obtain agreement or a ruling that services may be provided to the child.

The District does not use the parents' refusal to consent to one service or activity to deny the parents or the child any other service, benefit or activity in the District, except in those instances in which IDEA authorizes that denial.

(7) REVOCATION OF CONSENT

The parents may revoke consent for and remove the child from special education and related services. Once the District receives written revocation of consent, it provides the parents with prior written notice and continues to provide the child with appropriate interventions through the regular education environment.

The District is not required to amend the child's education records to remove any references to the child's receipt of special education and related services because of the revocation of consent.

If a parent has provided written revocation of consent, the District does not file a due process complaint or engage in conflict resolution to attempt to obtain agreement or a ruling that special education and related services may be provided to the child.

D. INDEPENDENT EDUCATIONAL EVALUATION

Parents who disagree with an evaluation that was completed or obtained by the District may request an independent educational evaluation at public expense. Parents are entitled to request only one independent educational evaluation at public expense each time the District conducts an evaluation with which the parents disagree.

(1) INDEPENDENT EDUCATIONAL EVALUATION AT PUBLIC EXPENSE

If the parents request an independent educational evaluation at public expense, the District either:

- (a) Ensures that an independent evaluation is provided at public expense; or
- (b) Files a due process complaint requesting a hearing to show that the District's evaluation is appropriate.

If the District files a due process complaint and the final decision is that the District's evaluation is appropriate, the parent still has the right for an independent educational evaluation, but not at the public expense.

(2) PARENT INITIATED EVALUATIONS

If a parent obtains an independent educational evaluation at public expense or shares with the District an evaluation obtained at private expense, the District considers that evaluation, if it meets District criteria, in any decision made with respect to the provision of FAPE to the child.

(3) DISTRICT CRITERIA

If an independent educational evaluation is at public expense, the criteria under which the evaluation is obtained, including the location of the evaluation and the qualifications of the examiner, must be the same as the criteria which the District uses when it initiates an evaluation, to the extent those criteria are consistent with the parent's right to an independent educational evaluation. Except for the above-mentioned criteria, the District does not impose conditions or timelines related to obtaining an independent educational evaluation at public expense.

E. CONFLICT RESOLUTION

(1) ADMINISTRATIVE REVIEWS

Within 20 days of receipt of a complaint from a child's parents or another educational agency, the District's superintendent, or the superintendent's designee, conducts a review, may hold an administrative hearing and notifies all parties of the decision in writing.

- (a) All parties have the right to invite others, including legal counsel, to participate in the review.
- (b) The review is conducted at a time and place convenient to all parties.
- (c) Every effort is made to resolve any disagreements at the administrative review.

(2) MEDIATION

At its discretion, the District participates in the resolution of disputes with other parties through the voluntary mediation processes available through ODE-OEC.

(3) IMPARTIAL DUE PROCESS HEARING/RESOLUTION MEETINGS

Due process complaints filed against the District proceed in the manner set forth in 3301-51-05(K) of the Operating Standards.

The District convenes a resolution meeting before the initiation of a due process hearing. The resolution meeting:

- (a) Occurs within 15 days of the receipt of notice of the parents' due process complaint;
- (b) Includes a representative of the District who has decision-making authority on behalf of the District;
- (c) Does not include the District's attorney unless the parents are accompanied by an attorney;
- (d) Provides an opportunity for the parents to discuss their due process complaint and the facts the complaint is based on; and
- (e) Provides the District an opportunity to resolve the dispute.

The District does not hold a resolution meeting if the parents and the District agree in writing to waive the meeting or agree to use the mediation process. Also, if the District files the due process complaint, it is not required to hold a resolution meeting.

The District, if it is the child's school district of residence, is responsible for conducting the impartial due process hearing utilizing the hearing officer appointed by ODE-OEC. The District follows the procedures required by 3301-51-05(K)(10)–(15) of the Operating Standards when conducting a hearing at a time and place that is reasonably convenient to the parents and the child involved.

If the parents request to inspect and review any education records relating to their child, the District replies without unnecessary delay and makes the records available before the hearing.

The District provides the parents with one copy of the written, or at the option of the parents, an electronic verbatim record of the hearing and findings of fact and decision at no cost. The decision is final except that any party to the hearing may appeal the decision to ODE-OEC.

The District pays for the costs incurred for the hearing except for expert testimony, outside medical evaluations, witness fees, subpoena fees and cost of counsel requested by the other party to the hearing and compensates the hearing officer as provided in 3301-51-05(K)(16)(d) of the Operating Standards. If the hearing was requested by another agency, the District shares the costs of the hearing except for the costs identified in the preceding sentence.

Any further appeals or actions proceed in accordance with 3301-51-05 of the Operating Standards.

F. CHILD'S STATUS DURING DUE PROCESS PROCEEDINGS/CODE OF CONDUCT VIOLATIONS

(1) CHILD'S STATUS DURING DUE PROCESS PROCEEDINGS

The District ensures that a child remains in the current educational placement during the pendency of any administrative or judicial proceeding regarding a due process complaint, unless the state or the District and the parents of the child agree otherwise. If the state level review officer agrees with the child's parents that a change in placement is appropriate, that placement is treated as an agreement between the state and the parents.

If the complaint involves an application for initial admission to the District, the child, with the consent of the parents, is placed in the District until the completion of all proceedings.

If the complaint involves an application for services from a child who is transitioning from Part C to Part B, the District provides those special education and related services that are not in dispute, if the child is found eligible for special education and related services under Part B and the parent consents to the initial provision of special education and related services.

(2) DISCIPLINARY PROCEEDINGS

The District may consider any unique circumstances on a case-by-case basis when determining whether a change in placement, consistent with the other requirements of 3301-51-05 of the Operating Standards, is appropriate for a child with a disability who violates a code of student conduct.

(a) Changes in placement less than 10 consecutive school days

The District may remove a child with a disability who violates a code of student conduct from the child's current placement to an appropriate interim alternative educational setting, another setting, or suspension, for not more than 10 consecutive school days (to the extent those alternatives are applied to children without disabilities), and for additional removals of not more

than 10 consecutive school days in that same school year for separate incidents of misconduct (as long as those removals do not constitute a change of placement).

The District considers on a case-by-case basis whether a pattern of removals constitutes a change of placement. A change in placement occurs if:

- (1) The removal is for more than 10 consecutive school days, **or**
- (2) The child has been subjected to a series of removals that constitute a pattern:
 - (a) Because the series of removals totals more than 10 school days in a school year;
 - (b) Because the child's behavior is substantially similar to the child's behavior in previous incidents that resulted in the series of removals; and
 - (c) Because of such additional factors as the length of each removal, the total amount of time the child has been removed and the proximity of the removals to one another.

(b) Services during removal from current placement

The District provides services to a child removed from the child's current placement as follows:

- (1) If the child has been removed from the child's current placement for 10 school days or less in the school year, services are provided only to the extent that services are provided to a child without disabilities who is similarly removed;
- (2) After a child with a disability has been removed from the child's current placement for 10 school days in the same year (under circumstances in which the current removal is for not more than 10 consecutive days and is **not** a change in placement), the District provides services, as determined by school personnel in consultation with at least one of the child's teachers, so as to enable the child to continue to participate in the general education curriculum, although in another setting, and to progress toward meeting the goals set out in the child's IEP;
- (3) If the removal is a change in placement, the child's IEP team determines appropriate services; and
- (4) If a child with a disability is removed from the child's current placement for either more than 10 consecutive days for behavior that is determined **not** to be a manifestation of the child's disability or under circumstances that constitute special circumstances, as defined below, the District ensures that the child:
 - (a) Continues to receive educational services so as to enable the child to continue to participate in the general education curriculum, although in another setting, and to progress toward meeting the goals set out in the child's IEP; and
 - (b) Receives, as appropriate, a functional behavioral assessment and behavioral intervention services and modifications that are designed to address the behavior violation so that it does not recur.

(c) Manifestation determination

Within 10 school days of any decision to change the placement of a child with a disability because of a violation of a code of student conduct, the school district, the parent and relevant members of the child's IEP team (as determined by the parent and the school district) must review all relevant information in the child's file, including the child's IEP, any teacher observations and any relevant information provided by the parents to determine if the conduct

was a manifestation of the child's disability. The District determines that the conduct is a manifestation of the child's disability:

- (1) If the conduct in question was caused by, or had a direct and substantial relationship to, the child's disability; or
- (2) If the conduct in question was the direct result of the school district's failure to implement the IEP.

If the District, parents and relevant members of the IEP team determine that the conduct in question was the direct result of the school district's failure to implement the IEP, the District takes immediate steps to remedy those deficiencies.

- (1) If the conduct was a manifestation of the child's disability, the IEP team either:
 - (a) Starts to conduct a functional behavioral assessment within 10 days of the manifestation determination and complete the assessment as soon as practicable, unless the school district had conducted a functional behavioral assessment before the behavior that resulted in the change of placement occurred, and implemented a behavioral intervention plan for the child; **or**
 - (b) If a behavioral intervention plan already has been developed, within 10 days of the manifestation determination, reviews the behavioral intervention plan and the implementation of the plan, and modifies it, as necessary, to address the behavior subject to disciplinary action; **and**
- (2) Returns the child to the placement from which the child was removed, unless the parent and the District agree to a change of placement as part of the modification of the behavioral intervention plan.

(d) Special circumstances.

The District may remove a child to an interim alternative educational setting for not more than 45 school days without regard to whether the behavior is determined to be a manifestation of the child's disability, if the child:

- (1) Carries a weapon to or possesses a weapon at school, on school premises, or to or at a school function under the jurisdiction of ODE or a school district;
- (2) Knowingly possesses or uses illegal drugs, or sells or solicits the sale of a controlled substance, while at school, on school premises, or at a school function under the jurisdiction of ODE or a school district; or
- (3) Has inflicted serious bodily injury upon another person while at school, on school premises, or at a school function under the jurisdiction of ODE or a school district.

The District defines the terms controlled substance, weapon, illegal drug and serious bodily injury in accord with 3301-51-05(K)(20)(h)(i) of the Operating Standards.

On the date on which the decision is made to make a removal that constitutes a change of placement of a child with a disability because of a violation of a code of student conduct, the school district must notify the parents of that decision and provide the parents with the procedural safeguards notice described in Section B above.

(e) Expedited Due Process Hearing

The District or the parents may submit a due process complaint requesting an expedited due process hearing to appeal a decision made during disciplinary procedures.

- (1) The District may request a an expedited due process hearing if it believes that maintaining the current placement of a child is substantially likely to result in injury to the child or to others.
- (2) The parents may request an expedited due process hearing to appeal decisions regarding placement for disciplinary removals or the manifestation determination.

The District is responsible for conducting the expedited due process hearing utilizing the hearing officer appointed by ODE-OEC. The District follows the procedures that apply for other due process hearings except that the expedited due process hearing must occur within 20 school days after the date the due process complaint is filed and no extensions of time shall be granted. The hearing officer then must make a determination within 10 school days after the hearing. The District follows the expedited timelines and the procedures set forth in 3301-51-05(K)(22)(c)-(d) of the Operating Standards.

G. TRANSFER OF PARENTAL RIGHTS AT AGE OF MAJORITY/STUDENT NOTIFICATION

Once a child reaches the age of majority, the District sends all required notices to both the student and parent, unless the student has been determined incompetent under state law. If a child with a disability is incarcerated in an adult or juvenile correctional institution, prior written notices are provided to both the parents and the student.

One year before the child's 18th birthday, the District notifies both the parents and the child of the parental rights that will transfer to the child upon reaching the age of majority (age 18) and provides the child with a copy of *Whose IDEA Is This?* The District documents this notice on the child's IEP PR-07 form.

Once the child turns 18, the District obtains informed written consent, as required by the Operating Standards, from the student, unless the student has been determined incompetent under state law.

H. SURROGATE PARENTS

The District ensures that the rights of a child are protected when:

- (1) No parent, as defined in 3301-51-01 of the Operating Standards, can be identified;
- (2) The District, after making reasonable efforts, cannot locate a parent;
- (3) The child is a ward of the state; or
- (4) The child is an unaccompanied homeless youth as defined by 3301-51-05(E)(1)(d) of the Operating Standards.

One way in which the District protects the rights of such children is through the assignment of surrogate parents where appropriate. The District has a method for determining when a child needs a surrogate parent and for assigning a surrogate parent to the child, and complies with the requirements of 3301-51-05(E) of the Operating Standards regarding surrogate parents.

V. EVALUATION

The District ensures that initial evaluations are conducted and that reevaluations are completed for children residing within the District. The District uses a referral process to determine whether or not a child is a child with a disability. The District also provides interventions to assist a child who is performing below grade-level standards. The provision of intervention services is not used to unnecessarily delay a child's evaluation for purposes of determining eligibility for special education services.

A. INITIAL EVALUATION

1. TIMING AND INITIATION

The district conducts an evaluation before the initial provision of special education and related services. Either a parent of a child or a public agency may initiate a request for an initial evaluation to determine if the child is a child with a disability.

Within 30 days of receipt of a request for an evaluation, the District either obtains parental consent for an initial evaluation or provides to the parents prior written notice stating that the school district does not suspect a disability and will not be conducting an evaluation.

The initial evaluation:

- (a) Is conducted within 60 days of receiving parental consent for the evaluation unless the exception set forth in 3301-51-06(B)(5) of the Operating Standards applies; and
- (b) Consists of procedures:
 - (i) To determine if the child is a child with a disability as defined in 3301-51-01(B)(10) of the Operating Standards; and
 - (ii) To determine the educational needs of the child.

The district obtains parental consent before conducting an evaluation. See Chapter IV, Section C, regarding parental consent requirements.

The evaluation team consists of the IEP team and other qualified professionals.

2. THE EVALUATION PLAN AND EVALUATION TEAM REPORT

As part of the initial evaluation, if appropriate, and as part of any reevaluation, the evaluation team shall develop an evaluation plan that will provide for the following and be summarized in an evaluation team report:

- (a) Review of existing evaluation data on the child, including:
 - (i) Evaluations and information provided by the parents of the child;
 - (ii) Current classroom-based, local or state assessments and classroom-based observations;
 - (iii) Observations by teachers and related services providers;
 - (iv) Data about the child's progress in the general curriculum, or, for the preschool-age child, data pertaining to the child's growth and development;

- (v) Data from previous interventions, including:
 - (a) Interventions required by rule 3301-51-06 of the Operating Standards and
 - (b) For the preschool child, data from early intervention, community, or preschool program providers; and
- (vi) Any relevant trend data beyond the past twelve months, including the review of current and previous IEPs; and
- (b) On the basis of that review and input from the child's parents, identify what additional data, if any, are needed to determine:
 - (i) Whether the child is a child with a disability, as defined in 3301-51-01 of the Operating Standards, and the educational needs of the child;
 - (ii) In the case of a reevaluation of a child, whether the child continues to have such a disability and the educational needs of the child;
 - (iii) The present levels of academic achievement and related developmental needs of the child;
 - (iv) Whether the child needs special education and related services; or
 - (v) In the case of a reevaluation of a child, whether the child continues to need special education and related services; and
 - (vi) Whether any additions or modifications to the special education and related services are needed to enable the child to meet the measurable annual goals set out in the IEP of the child and to participate, as appropriate, in the general education curriculum.

The District administers such assessments and other evaluation measures as may be needed to produce the data identified above. The district provides prior written notice to the parents of a child with a disability that describes any evaluation procedures the school district proposes to conduct.

3. CONDUCT OF EVALUATION

In conducting the evaluation, the District:

- (a) Uses a variety of assessment tools and strategies to gather relevant functional, developmental and academic information about the child, including information provided by the parent, that may assist in determining:
 - (i) Whether the child is a child with a disability as defined in 3301-51-01(B)(10) of the Operating Standards; and
 - (ii) The content of the child's IEP, including information related to enabling the child to be involved in and progress in the general education curriculum (or for a preschool child to participate in appropriate activities);
- (b) Does not use any single measure or assessment as the sole criterion for determining whether a child is a child with a disability and for determining an appropriate educational program for the child; and
- (c) Uses technically sound instruments that may assess the relative contribution of cognitive and behavioral factors, in addition to physical or developmental factors.

The District ensures that:

- (a) Assessments and other evaluation materials used to assess a child:
 - (i) Are selected and administered so as not to be discriminatory on a racial or cultural basis;
 - (ii) Are provided and administered in the child's native language or other mode of communication and in the form most likely to yield accurate information about what the child knows and can do academically, developmentally and functionally, unless it is clearly not feasible to so provide or administer;
 - (iii) Are used for the purposes for which the assessments or measures are valid and reliable;
 - (iv) Are administered by trained and knowledgeable personnel; and
 - (v) Are administered in accordance with any instructions provided by the producer of the assessments.
- (b) Assessments and other evaluation materials include those tailored to assess specific areas of educational need and not merely those that are designed to provide a single general intelligence quotient.
- (c) Assessments are selected and administered so as best to ensure that if an assessment is administered to a child with impaired sensory, manual or speaking skills, the assessment results accurately reflect the child's aptitude or achievement level or whatever other factors the test purports to measure rather than reflecting the child's impaired sensory, manual or speaking skills (unless those skills are the factors that the test purports to measure);
- (d) A school age child is assessed in all areas related to the suspected disability, including, if appropriate, health, vision, hearing, social and emotional status, general intelligence, academic performance, communicative status and motor abilities;
- (e) Preschool children are assessed in the following developmental areas: adaptive behavior, cognition, communication, hearing, vision, sensory/motor function, social-emotional functioning and behavioral function.
- (f) Assessments of children with disabilities who transfer from one school district to another school district in the same school year are coordinated with the children's prior and subsequent schools, as necessary and as expeditiously as possible, consistent with 3301-51-06(B)(5)(b) and (B)(6) of the Operating Standards, to ensure prompt completion of the full evaluations.
- (g) In evaluating each child with a disability under 3301-51-06(E)-(G) of the Operating Standards, the evaluation is sufficiently comprehensive to identify all of the child's special education and related services needs, whether or not commonly linked to the disability category in which the child has been classified.
- (h) Assessment tools and strategies that provide relevant information that directly assists persons in determining the educational needs of the child are provided.
- (i) Medical consultation shall be encouraged for a preschool or school-age child on a continuing basis, especially when school authorities feel that there has been a change in the child's behavior or educational functioning or when new symptoms are detected; and
- (j) For preschool-age children, as appropriate, the evaluation shall include the following specialized assessments:

- (i) Physical examination completed by a licensed doctor of medicine or doctor of osteopathy in cases where the disability is primarily the result of a congenital or acquired physical disability;
- (ii) Vision examination conducted by an eye care specialist in cases where the disability is primarily the result of a visual impairment; and
- (iii) An audiological examination completed by a certified or licensed audiologist in cases where the disability is primarily the result of a hearing impairment.

B. ELIGIBILITY DETERMINATION AND EVALUATION TEAM REPORT

1. COMPLETION OF THE EVALUATION TEAM REPORT

The following occurs upon completion of the administration of assessments and other evaluation measures:

- (a) The IEP team and other qualified professionals and the parent of the child determines whether the child is a child with a disability, in accordance with the Operating Standards; and
- (b) The District provides a copy of the evaluation report and the documentation of determination of eligibility at no cost to the parent.

The written evaluation team report shall include:

- (a) A summary of the information obtained during the evaluation process; and
- (b) The names, titles and signatures of each team member, including the parent, and an indication of whether or not they are in agreement with the eligibility determination. Any team member who is not in agreement with the team's determination of disability shall submit a statement of disagreement.

The District provides a copy of the evaluation team report and the documentation of determination of eligibility or continued eligibility to the parents prior to the next IEP meeting and in no case later than 14 days from the date of eligibility determination.

2. DETERMINATION OF ELIGIBILITY

A child is not determined to be a child with a disability:

- (a) If the determinant factor for that determination is:
 - (i) Lack of appropriate instruction in reading, including the essential components of reading instruction as defined in Section 1208(3) of the Elementary and Secondary Act of 1965, as amended and specified in the No Child Left Behind Act of 2002, January 2002, 20 U.S.C. 6301 (ESEA);
 - (ii) Lack of appropriate instruction in math; or
 - (iii) LEP; and
- (b) If the child does not otherwise meet the eligibility criteria under 3301-51-01(B)(10) of the Operating Standards.

The district, in interpreting evaluation data for the purpose of determining if a child is a child with a disability, does the following:

- (a) Draws upon information from a variety of sources, including aptitude and achievement tests, state and district wide assessments, parent input and teacher recommendations, as well as information about the child's physical condition, social or cultural background and adaptive behavior; and
- (b) Ensures that information obtained from all of these sources is documented and carefully considered.

If a determination is made that a child has a disability and needs special education and related services, the District develops an IEP for the child.

C. REEVALUATIONS

The District conducts reevaluations of a child with a disability:

- (a) If the District determines that the child's educational or related services needs, including improved academic achievement and functional performance, warrant a reevaluation; or
- (b) If the child's parent or teacher requests a reevaluation; or
- (c) When a child transitions from pre-school to school-aged services; or
- (d) In order to make a change in disability category.

A reevaluation may not occur more than once a year, unless the parent and the District agree otherwise.

A reevaluation must occur at least once every three years, unless the parent and the District agree that a reevaluation is unnecessary.

The District evaluates a child with a disability before determining that child is no longer a child with a disability, although this evaluation is not required if the child's eligibility terminates due to graduation from secondary school with a regular diploma or due to exceeding the age eligibility for FAPE under state law. If a child's eligibility terminates for one of these reasons, the District provides the child with a summary of the child's academic achievement and functional performance, which shall include recommendations on how to assist the child in meeting the child's postsecondary goals.

D. IDENTIFYING CHILDREN WITH SPECIFIC LEARNING DISABILITIES (SLD)

The District has written procedures for the implementation of the evaluation process the District uses to determine the existence of a specific learning disability (SLD). In addition, the District uses the form required by ODE-OEC, Evaluation Team Report PR-06 and completes Part 3: Documentation for Determining the Existence of a Specific Learning Disability of PR-06 when the District suspects the child has a SLD.

(1) DETERMINING THE EXISTENCE OF A SPECIFIC LEARNING DISABILITY

The parents, the IEP team, and a group of qualified professionals from the District determine that a child has a SLD if:

- (a) The child does not achieve adequately for the child's age or to meet state-approved grade-level standards in one or more of the following areas, when the District provides learning experiences and instruction appropriate for the child's age or state-approved grade-level standards:
 - (i) Oral expression;
 - (ii) Listening comprehension;
 - (iii) Written expression;
 - (iv) Basic reading skill;
 - (v) Reading fluency skills;
 - (vi) Reading comprehension;
 - (vii) Mathematics calculation; or
 - (viii) Mathematics problem-solving;

AND

- (b) The child does not make sufficient progress to meet age or state-approved grade-level standards in one or more of the areas identified in number 1, above, when the District uses an evaluation process to determine the child's response to scientific, research-based intervention;

OR

- (c) The child exhibits a pattern of strengths and weaknesses in performance, achievement, or both, relative to age, state-approved grade-level standards, or intellectual development, when the District uses appropriate assessments consistent with 3301-51-06(E) and (F) of the Operating Standards that the group has determined to be relevant to the identification of a SLD.

Alternatively, the District may choose a third method of evaluation, for determining if a child has a SLD. The District seeks prior approval from ODE-OEC if it chooses to use an alternative research-based assessment procedure to determine if a child has a SLD.

(2) USE OF AN EVALUATION PROCESS BASED ON THE CHILD'S RESPONSE TO SCIENTIFIC, RESEARCH-BASED INTERVENTION FOR SLD DETERMINATION

If the District uses an evaluation process based on the child's response to scientific, research-based intervention to determine whether a child has a SLD. The District ensures that this process:

- (a) Begins when the District has gathered and analyzed sufficient data from scientifically-based instruction and targeted and intensive individualized interventions that provide evidence that the child's needs are unlikely to be met without certain specialized instruction, in addition to the regular classroom instruction;
- (b) Employs interventions that are scientifically-based and provided at appropriate levels of intensity, frequency, duration and integrity, relative to the child's identified needs;

- (c) Is based on results of scientifically-based, technically adequate assessment procedures that assess ongoing progress while the child is receiving scientifically-based instruction and the results of these procedures have been reported to the child's parents; and
- (d) Includes the analysis of data described in 3301-51-06(H)(3)(b)(i) and (H)(3)(b)(ii) of the Operating Standards to determine whether a discrepancy is present between the child's actual and expected performance, in both the child's rate of progress in developing skills, and in the child's level of performance on measures assessing one or more of the academic areas listed in 3301-51-06(H)(3)(a)(i) of the Operating Standards

The District will not use this process to delay unnecessarily a child's referral for a comprehensive evaluation to determine eligibility for special education services.

(3) ADDITIONAL REQUIREMENTS FOR SLD DETERMINATION

The District ensures that the following additional requirements are satisfied when determining if a child has a SLD:

Inclusion of additional required group members for SLD determination

The group that determines that a child suspected of having a SLD is a child with a disability includes the child's parents and a group of qualified professionals consisting of, but not limited to:

- (a) In the case of a school-age child, the child's regular teacher (or if the child does not have a regular teacher, the District includes a regular classroom teacher qualified to teach a child of the child's age);
- (b) In the case of children less than school-age, an individual qualified by ODE to teach a child of the child's age; and

At least one person qualified to conduct individual diagnostic examinations of children, such as a school psychologist, speech-language pathologist or remedial reading teacher.

Observation requirements

The District ensures that the child is observed in the child's learning environment, including the regular classroom setting, to document the child's academic performance and behavior in the areas of difficulty. The group of qualified professionals identified by the District conducts the observation by:

- (a) Using information from an observation of the child's performance conducted during routine classroom instruction, including monitoring of the child's performance during instruction, that was done before the child was referred for an evaluation; or
- (b) Having at least one member of the group conduct an observation of the child's academic performance in the regular classroom after the child has been referred for an evaluation and parent consent has been obtained.

In the case of a child of less than school-age or a child who is out of school, the District ensures that a group member observes the child in an environment appropriate for a child of that age.

Ensuring the child's underachievement is not due to a lack of appropriate instruction in reading and math

In order to ensure that underachievement in a child suspected of having a SLD is not due to lack of appropriate instruction in reading or math, the District considers:

- (a) Data demonstrating that prior to, or as part of, the referral process, the child received appropriate instruction in regular education settings delivered by qualified personnel; and
- (b) Data-based documentation of repeated assessments of achievement at reasonable intervals, reflecting formal assessment of the child's progress during instruction, the results of which were provided to the child's parents.

Obtaining parental consent to evaluate

The District promptly requests parental consent to evaluate a child to determine if the child needs special education and related services:

- (a) If prior to the referral, the child does not make adequate progress after an appropriate period of time when provided with appropriate instruction. To make this determination, the District considers:
 - (i) Data demonstrating that prior to, or as part of, the referral process, the child received appropriate scientifically-based instruction in regular education settings delivered by qualified personnel; and
 - (ii) Data-based documentation of repeated assessments of achievement at reasonable intervals, reflecting formal assessment of the child's progress during instruction, the results of which were provided to the child's parents; and
- (b) Whenever a child is referred for an evaluation.

Consideration of exclusionary factors

When determining that a child has a SLD, the District ensures that the findings from the evaluation process are not primarily the result of:

- (a) A visual, hearing, or motor disability;
- (b) Mental retardation;
- (c) Emotional disturbance;
- (d) Cultural factors;
- (e) Environmental or economic disadvantage; or
- (f) LEP.

If the District determines that one of these factors is the primary reason for the child's suspected disability, the District does not identify the child as having a SLD.

VI. INDIVIDUALIZED EDUCATION PROGRAMS (IEPs)

The District ensures that an IEP is developed and implemented for each child with a disability, ages 3 through 21, inclusive, who requires special education and related services and who resides in the district. For all children with disabilities for whom our district is the district of residence, the District is responsible for ensuring that the requirements of 3301-51-07 of the Operating Standards are met regardless of which district, county board of MR/DD, or other educational agency implements the child's IEP.

The meeting to develop an IEP is conducted within 30 days of a decision that a child needs special education and related services.

The initial IEP is developed within whichever of the following time periods is the shortest:

- (a) Within 30 calendar days of the determination that the child needs special education and related services;
- (b) Within 90 days of receiving informed parental consent for an evaluation; or
- (c) Within 120 calendar days of receiving a request for an evaluation from a parent or school district (unless the evaluation team has determined it does not suspect a disability).

The District ensures that the parents receive a copy of the child's IEP at no cost to the parents. The parents may receive a copy of the IEP either at the conclusion of the IEP meeting or within 30 calendar days of the date of the IEP meeting.

A. MEMBERS OF THE IEP TEAM

The IEP team includes:

- (1) The child's parents;
- (2) Not less than one of the child's regular education teachers, if the child is or may be participating in the regular education environment;
- (3) Not less than one special education teacher of the child or, where appropriate, not less than one special education provider of the child;
- (4) A representative of the school district who:
 - a) Is qualified to provide, or supervise the provision of, specially designed instruction to meet the unique needs of children with disabilities;
 - b) Knows the general education curriculum; and
 - c) Knows about the availability of resources of the school district.
- (5) Someone who can interpret the instructional implications of the evaluation results, who may be one of the team noted previously;
- (6) At the discretion of the parents or the school district, other individuals who have knowledge or special expertise regarding the child, including related services personnel as appropriate; and
- (7) The child, whenever appropriate. The child must be invited if a purpose of the meeting is the consideration of postsecondary goals for the child and the transition services needed to assist the child in reaching those goals.

A member of the IEP team, other than the parent and the child if appropriate, is not required to attend an IEP team meeting, in whole or in part, if the parent and the district agree, in writing, that the attendance of that member is not necessary because the member's area of the curriculum or related services is not being modified or discussed at the meeting or portion of the meeting.

B. PARENTAL PARTICIPATION

The District takes steps to ensure that one or both of the parents of a child with a disability are present at each IEP team meeting or are afforded the opportunity to participate, including:

- (1) Notifying the parents of the meeting early enough to ensure that they will have an opportunity to attend; and
- (2) Scheduling the meeting at a mutually-agreed upon time and place.

A Notice to a Parent Regarding an IEP meeting:

- (1) Indicates the purpose, time and location of the meeting and who will be in attendance; and
- (2) Informs the parents of the provisions of the Operating Standards regarding the participation of other individuals who have knowledge or special expertise about the child and the participation of the Part C service coordinator or other representatives of the part C system at the initial IEP team meeting for a child previously served under Part C. See 3301-51-07(J)(2)(a)(ii) of the Operating Standards.

Beginning no later than the first IEP to be in effect when the child turns 14, the Notice also:

- (1) Indicates that a purpose of the meeting will be the development of a statement of the transition needs of the child; and
- (2) Indicates that the District will invite the child.

Beginning no later than the first IEP to be in effect when the child turns 16, the Notice also:

- (1) Indicates that a purpose of the meeting will be the consideration of the postsecondary goals and transition services for the child;
- (2) Indicates that the school district will invite the child; and
- (3) Identifies any other agency that will be invited to send a representative, if the parents consent.

The District conducts IEP team meetings without a parent in attendance only if it cannot convince parents that they should attend. Before an IEP team meeting is held without a parent, the District makes multiple attempts to contact a parent to arrange a mutually agreed on time and place, and records its attempts to do so.

C. CONTENTS OF AN IEP

The District uses ODE's required form, PR-O7, for its IEPs.

In developing each child's IEP, the IEP team considers:

- (1) The strengths of the child;

- (2) The concerns of the parents for enhancing the education of their child;
- (3) The results of the initial or most recent evaluation of the child;
- (4) The results of the child's performance on any state or district-wide assessment programs, as appropriate; and
- (5) The academic, developmental and functional needs of the child.

Further, the IEP team considers the following special factors:

- (1) In the case of a child whose behavior impedes the child's learning or that of others, the use of positive behavioral interventions and supports, and other strategies, to address that behavior;
- (2) In the case of a child with LEP, the language needs of the child as those needs relate to the child's IEP;
- (3) In the case of a child who is blind or visually impaired, the instruction of that child in accordance with the Operating Standards and section 3323.011 of the Revised Code;
- (4) The communication needs of the child, including those of a child who is deaf or hard of hearing; and
- (5) Whether the child needs assistive technology devices and services.

(1) CONTENTS OF EVERY IEP

The District's IEPs are written, and are developed, reviewed and revised in IEP meetings. The District's IEPs include all of the following:

- (a) A statement that discusses the child's future and documents planning information;
- (b) A statement of the child's present levels of academic and functional performance, including:
 - (1) How the child's disability affects the child's involvement and progress in the general education curriculum (i.e., the same curriculum as for nondisabled children); or
 - (2) For preschool children, as appropriate, how the disability affects the child's participation in appropriate activities;
- (c) A statement of measurable annual goals, including academic and functional goals and benchmarks or short-term objectives designed to:
 - (1) Meet the child's needs that result from the child's disability to enable the child to be involved in and make progress in the general education curriculum; and
 - (2) Meet each of the child's other educational needs that result from the child's disability;
- (d) A description of:
 - (1) How the child's progress toward meeting the annual goals described in the IEP will be measured; and
 - (2) When periodic reports on the progress the child is making toward meeting the annual goals will be provided;
- (e) A statement of the special education and related services and supplementary aids and services, based on peer-reviewed research to the extent practicable, to be provided to the child, or on behalf of the child, and a statement of the program modifications or supports for school personnel that will be provided to enable the child:
 - (1) To advance appropriately toward attaining the annual goals;

- (2) To be involved in and make progress in the general education curriculum in accordance with the Operating Standards, and to participate in extracurricular and other nonacademic activities; and
- (3) To be educated and participate with other children with disabilities and nondisabled children, as appropriate, in the activities described in 3301-51-07(H)(1)(e) of the Operating Standards;
- (f) An explanation of the extent, if any, to which the child will not participate with nondisabled children in the regular classroom and in activities;
- (g) A statement of any individual appropriate accommodations that are necessary to measure the academic achievement and functional performance of the child on state and districtwide assessments consistent with Section 612(a)(16) of the IDEA;
- (h) If the IEP team determines that the child must take an alternate assessment instead of a particular regular state or districtwide assessment of student achievement, a statement of why:
 - (1) The child cannot participate in the regular assessment; and
 - (2) The particular alternate assessment selected is appropriate for the child; and
- (i) The projected date for the beginning of the services and modifications described in the IEP and the anticipated frequency, location and duration of those services and modifications.

(2) TRANSITION SERVICES

The District's IEPs address transition services as follows:

- (a) For children age 14 or over (or younger, if determined appropriate by the IEP team), the IEP includes a statement, updated annually, of the transition service needs of the child under the applicable components of the child's IEP that focuses on the child's courses of study (such as participation in advanced-placement courses or a vocational education program.); and
- (b) Beginning not later than the first IEP to be in effect when the child turns 16 (or younger if determined appropriate by the IEP team), the IEP includes:
 - (1) Appropriate measurable postsecondary goals based upon age-appropriate transition assessments related to training, education, employment and, where appropriate, independent living skills; and
 - (2) The transition services (including courses of study) needed to assist the child in reaching those goals.

(3) TRANSFER OF RIGHTS AT AGE OF MAJORITY

Beginning not later than one year before the child reaches 18 years of age, the IEP includes a statement that the child has been informed of the child's rights under Part B of the IDEA that will transfer to the child on reaching the age of majority.

(4) NONACADEMIC SERVICES, PHYSICAL EDUCATION, EXTENDED SCHOOL YEAR AND TRANSPORTATION

If appropriate, the IEP includes the services to be provided in each of these areas.

D. REVIEW AND AMENDMENT OF AN IEP

The District ensures that the IEP team:

- (1) Reviews the child's IEP periodically, but not less than annually, to determine whether the annual goals for the child are being achieved; and
- (2) Revises the IEP, as appropriate, to address:
 - (a) Any lack of expected progress toward the annual goals and in the general education curriculum;
 - (b) The results of any reevaluation;
 - (c) Information about the child provided to, or by, the parents as part of an evaluation or reevaluation;
 - (d) The child's anticipated needs; or
 - (e) Other matters; and
- (3) Reconvenes if an agency, other than the school district, fails to provide the transition services described in the IEP.

Changes to the IEP may be made either at an IEP team meeting, or by a written document amending or modifying the IEP, if the parent of the child and the District agree not to convene an IEP team meeting for the purposes of making those changes. If the IEP is amended by written document, without a meeting of the IEP team, the District ensures that the IEP team is informed of the changes made. When an IEP is amended, the District sends a copy of the amended IEP to the parent within thirty days of the date the IEP was amended.

VII. LEAST RESTRICTIVE ENVIRONMENT (LRE)

The District ensures that, to the maximum extent appropriate, children with disabilities, including children in public or nonpublic institutions or other care facilities, are educated with children who are nondisabled. Placement of students with disabilities in special classes, separate schooling or other removal from the regular educational environment occurs only if the nature or severity of the disability is such that education in regular classes with the use of supplementary aids and services, modifications and/or accommodations cannot be achieved satisfactorily.

The District ensures that a continuum of alternative placements is available to meet the needs of children with disabilities for special education and related services in the least restrictive environment (LRE).

The District determines the placement of a child with a disability at least annually, and the placement is based on the child's IEP, and is as close as possible to the child's home.

Unless the IEP of a child with a disability requires some other arrangement, the child is educated in the school that the child would attend if nondisabled.

In selecting the LRE for a child with a disability, the IEP team considers any potential harmful effect on the child or on the quality of the services that the child needs.

A child with a disability is not removed from education in age-appropriate regular classrooms solely because of needed modifications in the general education curriculum.

VIII. PARENTALLY PLACED NONPUBLIC SCHOOL CHILDREN

A. CHILD FIND

(1) GENERALLY

The District locates, identifies and evaluates all children with disabilities who are enrolled by their parents in chartered and nonchartered nonpublic schools, including religious elementary and secondary schools located within the District's geographical boundaries.

The District consults with the nonpublic school representatives and representatives of parents of parentally placed nonpublic school children with disabilities regarding the child find process, including:

- (a) How parentally placed nonpublic school children suspected of having a disability can participate equitably; and
- (b) How parent, teachers and nonpublic school officials will be informed of the child find process.

After timely and meaningful consultation with representatives of nonpublic schools, the District carries out child find activities for parentally placed nonpublic school children, including children whose parents live out-of-state. These activities are similar to the child find activities the District conducts for its public school children and ensures an accurate count of children with disabilities. The District completes these activities in a time period comparable to that for children attending its public schools, including completing any evaluations within 60 days of receiving parental consent. See Chapter V, Section A(1).

The District follows all IDEA and FERPA confidentiality requirements when serving children with disabilities attending nonpublic schools located within the District's boundaries and obtains parental consent before releasing any personally identifiable information about a child to officials of the child's district of residence or the nonpublic school in which the child is enrolled.

The District conducts, either directly or through contract, a full and individual initial evaluation of any parentally placed nonpublic school child suspected of having a disability who is enrolled in a nonpublic school within the District's boundaries. The District obtains written parental consent before conducting an initial evaluation.

- (a) If the parents of a parentally placed nonpublic school child do not provide consent or fail to respond to the District's request for consent to evaluate the child, the District may not use mediation or due process procedures to pursue the evaluation. The District does not have to consider this child as eligible for services.
- (b) If the parents do not make clear their intent to keep their child enrolled in the nonpublic school, the District provides the parents of a child who is determined to be eligible for special education services written documentation stating that the child's school district of residence is responsible for making FAPE available to the child.

- (c) The District sends a copy of this documentation to the child's district of residence, provided the District obtains written parental consent to release the information.

The District conducts reevaluations of parentally placed nonpublic school children with disabilities receiving special education and any related services to determine continued eligibility for services. The District conducts reevaluations no more than once a year, unless the parents and the District agree otherwise, and at least once every three years, unless the parents and the district agree that a reevaluation is unnecessary.

(2) AUTISM SCHOLARSHIP PROGRAM PARTICIPANTS

The District assumes responsibility for the initial evaluations and re-evaluations of children who reside in the District and desire to participate in the Autism Scholarship Program. The district where the nonpublic school is located conducts all reevaluations for children with disabilities participating in the Autism Scholarship Program. (See 3301-51-08(R)(1) of the Operating Standards). The District creates the IEP that is required for eligible children who reside within the District to participate in the Autism Scholarship Program.

B. CONSULTATION

The District consults with nonpublic school representatives and representatives of parents who have placed their children with disabilities in nonpublic schools in a timely and meaningful way during the design and development of special education and related services for the children regarding the following:

(1) CHILD FIND

See above requirements.

(2) PROPORTIONATE SHARE OF FUNDS

- (a) The determination of the proportionate share of federal IDEA Part B funds available to serve parentally-placed nonpublic school children with disabilities;
- (b) The determination of how the proportionate share of those funds was calculated; and
- (c) Consideration of the number of children and their needs and location.

“Proportionate share” refers to the amount of federal IDEA Part B funds the District must expend to provide the group of parentally-placed nonpublic school children with disabilities with equitable participation in services funded with federal IDEA Part B funds. The District follows the formula in 3301-51-05(E)(1)–(4) of the Operating Standards to calculate the proportionate amount.

(3) CONSULTATION PROCESS

- (a) How the consultation process will bring together District representatives, nonpublic school officials and representatives of parentally placed nonpublic school children with disabilities;

- (b) How the process will take place throughout the school year to ensure that parentally-placed nonpublic school children with disabilities identified through the child find can meaningfully participate in special education and related services.

(4) PROVISION OF SPECIAL EDUCATION AND RELATED SERVICES

- (a) How, where and by whom special education and related services will be provided;
- (b) The types of services, including direct services and alternate service delivery mechanisms;
- (c) How special education and related services will be apportioned if funds are insufficient to serve all parentally placed nonpublic school children; and
- (d) How and when these decisions will be made.

(5) WRITTEN EXPLANATION BY THE SCHOOL DISTRICT

How the District will provide the nonpublic school officials a written explanation of the reasons why the District chose not to provide services directly or through a contract if the District disagrees with the views of the nonpublic school officials on the provision of services or the types of services.

The District obtains a written affirmation signed by representatives of the participating nonpublic schools that timely and meaningful consultation has occurred. If representatives of the participating nonpublic schools do not provide the affirmation within a reasonable period of time or choose not to participate under the proportionate share provisions of IDEA and engage in consultation, the District documents its consultation attempts and forwards the documentation to the ODE-OEC. If a nonpublic school located within the boundaries of the District chooses not to participate, the parents may contact the District to request services for the child.

C. RIGHTS TO SERVICES

The District is not required to pay for the cost of education, including special education and related services, of a child with a disability, enrolled at a nonpublic school or facility if:

- (1) The child's district of residence made FAPE available to the child; and
- (2) The parents elected to place the child in the nonpublic school.

The District includes these children and their needs in the population being considered when making decisions about services to be provided to parentally placed nonpublic school children with disabilities.

If the parents make clear their intention to keep their child with a disability enrolled in the nonpublic school, the child's district of residence does not need to develop an IEP for the child. If the child with a disability re-enrolls in the District, the District makes FAPE available.

D. EQUITABLE SERVICES DETERMINED

The District makes the final decisions about the services to be provided through a services plan to eligible parentally placed nonpublic school children with disabilities who are attending

nonpublic schools within the District's geographic boundaries. The District makes these decisions after consultation with nonpublic school representatives and parents of parentally placed nonpublic school children and through meetings to develop, review and revise services plans. A child with a disability attending a nonpublic school does not have an individual right to receive some or all of the special education and related services that the child would receive if enrolled in a public school.

E. EQUITABLE SERVICES PROVIDED

(1) THE SERVICES PLAN

- (a) The District, whether or not it is the child's school district of residence, convenes the services plan meeting, conference call, or video conference for each eligible child who will receive special education and any related services for children who attend nonpublic schools located within the District's geographical boundaries.
- (b) The District determines required participants at the services meeting.
- (c) The District ensures that a nonpublic school representative participates in the development or revision of the services plan.
- (d) The District conducts a meeting, conference call, or video conference at least annually to review and revise, if appropriate, each child's services plan.
- (e) The District uses the ODE required Services Plan PR-09 form for individually developing a services plan for each participating child that describes the specific special education and related services that the District will provide to the child. Parentally placed nonpublic school children with disabilities may receive a different amount of services than children with disabilities enrolled in the District.

(2) PROVISION AND LOCATION OF SERVICES

- (a) District personnel provide services to parentally placed nonpublic school children who attend nonpublic schools located within the District's geographical boundaries or the District provides services through a contract with an individual, association, agency, organization or other entity.
- (b) The District ensures that special education and related services, including materials and equipment, provided to parentally placed nonpublic school children with disabilities are secular, neutral and non-ideological.
- (c) The District, in consultation with the nonpublic school, will determine where services will be provided. Services may be provided on or off the premises of the nonpublic school. The District may provide services at the nonpublic school with the permission of that school.

(3) TRANSPORTATION

- (a) The District provides transportation to parentally placed nonpublic school children with disabilities who attend nonpublic schools located within the District's geographical boundaries if the services being provided under IDEA are being delivered at a location other than the nonpublic school the child is attending. The District provides transportation:
 - (1) From the child's nonpublic school or the child's home to the site other than the nonpublic school; and

- (2) From the service site to the nonpublic school or to the child' home depending on the timing of the services;
- (b) The District may include the cost of transportation to special education and related services that are being delivered at a location other than the nonpublic school in calculating whether it has met the requirements of spending a proportionate amount of federal funds that it receives to serve children with disabilities; and
- (c) The District provides transportation to all children, with and without disabilities, who reside within the District and who are parentally placed in chartered nonpublic schools following the requirements in ORC 3327.01.

F. DUE PROCESS COMPLAINTS AND COMPLAINTS TO ODE

Due process rights do not apply to the provision of special education and related services the District has agreed to provide through a services plan. However, the parents of a child with a suspected disability, or a child identified as having a disability, who is enrolled in a nonpublic school, have the right to file a due process complaint against the District where the nonpublic school is located regarding that District's failure to meet the child find requirements, including location, identification, evaluation and reevaluation of the child.

If the District receives a due process complaint requesting a due process hearing from the parents of parentally placed nonpublic school child, the District follows the procedures that apply to other due process complaints.

The parents of a child with a disability, who has been unilaterally placed in a nonpublic school, have the right to file a formal written complaint with ODE-OEC regarding a number of different issues, which are listed in 3301-51-08(L)(3) of the Operating Standards.

APPENDIX A

**When to Provide
Prior Written Notice, Informed Consent and Procedural Safeguards Notice (*Whose IDEA Is This?*)**

Steps in the Special Education Process	Action Required		
	Notification or Informed Consent	Prior Written Notice to Parents PR-01	Whose IDEA Is This?
1. Procedural safeguards must be provided to the parents once a year			X
2. Procedural safeguards must be provided upon request of the parents			X
3. Initial referral for a suspected disability		X	X
4. Initial evaluation	Informed consent (Parent Consent for Evaluation PR-04 form)	X	
5. Eligibility determination		X	
6. IEP meeting	Notification (Parent Invitation to Meeting PR-02 form)	Provide after an IEP, if parents do not agree or do not attend the meeting	
7. Reevaluation with assessments conducted	Informed consent (Parent Consent for Evaluation PR-04 form)	Provide before, and after if parents do not agree or disability category changes	
8. Reevaluation without further assessments conducted	Notification	May use this form to notify before, and provide after, if parents do not agree or disability category changes	
9. No reevaluation conducted		X	
10. Transfers from out of state and out of district	Informed consent (Parent Consent for Evaluation PR-04 form) (If an evaluation is to be conducted)	Provide only after an IEP, if parents do not agree	If moved from out of state
11. Change of placement	Informed consent (IEP PR-07 form)	Provide only after an IEP, if parents do not agree	
12. Change in the type and amount of services		Provide only after an IEP, if parents do not agree	
13. Exit from special education	Notification (Summary of performance if graduating or aging out of special education)	X	
14. District refuses services requested by parents		X	
15. District proposes/refuses to change disability category		X	
16. Releasing personally identifiable information	Informed consent (written consent)		
17. Destruction of personally identifiable information	Notification prior to destruction		
18. Transfer of parental rights	Statement included in IEP PR-07 form		X
19. Upon receipt of the first due process complaint or upon receipt of first state complaint in school year			X
20. Disciplinary change in placement		X	X
21. Revocation of consent		X	

Prior Written Notice, Informed Consent and Procedural Safeguards Notice (*Whose IDEA Is This?*)

- 1. Procedural safeguards must be provided to the parents once a year.**
 The school district must give a copy of the **procedural safeguards notice (*Whose IDEA Is This?*)** to the parents at least once a year, except as noted below:

 - Upon initial referral or the parents request for evaluation;
 - Upon request by the parents;
 - Upon receipt of the first due process complaint or state complaint in a school year; and
 - Upon a change in placement for disciplinary action.

- 2. Procedural safeguards must be provided upon request of the parents.**
 The school district must give a copy of the **procedural safeguards notice (*Whose IDEA Is This?*)** to the parents whenever the parents request.

- 3. Initial referral for a suspected disability**
 On the date of the referral, the district must provide the parents with a copy of the **procedural safeguards notice (*Whose IDEA Is This?*)**. For a parental referral, the date of referral is the date that the district received either the verbal or written request from the parents to conduct an evaluation. For a district referral, the date of referral is the date that the screening or review team decided an evaluation should be conducted. See Evaluation – 6.2 Request and Referral for Initial Evaluation. Within 30 days of the date of initial referral by the parents for a suspected disability, the district must provide the **Prior Written Notice to Parents PR-01** form to the parents if the district does not suspect a disability.

- 4. Initial evaluation**
 Within 30 days of the date of initial referral by the parents for a suspected disability, the district must provide the **Prior Written Notice PR-01** form to the parents and receive written, **informed consent (Parent Consent for Evaluation PR-04 form)** from the parents prior to conducting any assessments as part of an initial evaluation. A description of any evaluation procedures the district proposes to conduct must also be provided to the parents. (If the notice relates to an action proposed by the district that also requires parental consent, the district may give notice at the same time it requires parental consent.)

- 5. Eligibility determination**
 If the evaluation team determines that a child is not eligible for special education and related services the district will provide the parents the **Prior Written Notice to Parents PR-01** form once this determination is made. If the evaluation team determines that a child is eligible for special education and related services, see Item number 6, IEP Meeting.

- 6. IEP Meeting**
 The district must use the required **Parent Invitation PR-02** form to notify and invite the parents to an IEP meeting. Districts must take steps to ensure that one or both parents are present at each IEP meeting or are afforded the opportunity to participate. This requires that the district:

 - Notify the parents of the IEP meeting early enough to ensure that they have an opportunity to attend; and
 - Schedule the meeting at a mutually agreed upon time and place.

A district must provide the **Prior Written Notice to Parents PR-01** form after an IEP meeting, if the parents do not agree with the IEP or any portion of the IEP or do not attend the meeting.

A district must provide **prior written notice** to the parents and receive **written, informed consent** from the parents before the initial placement of a child in special education. The **IEP PR-07** form serves as prior written notice unless the parents disagree with the IEP. Written informed consent to initiate special education and related services is provided through the parents' signature on the IEP form.

7. **Reevaluation with assessments conducted**

A district must provide the **Prior Written Notice to Parents PR-01** form and obtain **informed parental consent (Parent Consent for Evaluation PR-05 form)** before conducting any tests or assessments as part of a reevaluation of a child with disabilities, unless the district has provided notice and the parents have failed to respond to reasonable attempts to obtain consent.

The district must provide the **Prior Written Notice to Parents PR-01** form after the reevaluation is completed, if the parents disagree with the reevaluation or the reevaluation results in a change in the child's disability category.

8. **Reevaluation without further assessments conducted**

If the evaluation team determines that no additional data are needed to determine that the child continues to be a child with a disability and to determine the child's educational needs, the evaluation team must notify the child's parents. The notification that no further assessments are necessary must include:

- The team's determination and the reasons for the determination; and
- The parents' right to request an assessment to determine whether the child continues to be a child with a disability and to determine the child's educational needs.

The **Prior Written Notice to Parents PR-01** form may be used for this notification as long as it includes the information listed directly above.

The district must provide the **Prior Written Notice to Parents PR-01** form after the reevaluation is completed, if the parents disagree with the reevaluation or the reevaluation results in a change in the child's disability category.

9. **No reevaluation conducted**

If the IEP team, including the parents, agrees that a reevaluation of a child is unnecessary, the district must provide the **Prior Written Notice to Parents PR-01** form.

10. **Transfers from out of state and out of district**

Upon the enrollment of a child with an existing IEP from another district or state, the district must convene the IEP team and determine if the team will accept the existing IEP or change the existing IEP. If the parents disagree with the IEP team on the IEP that will be implemented by the district, the **Prior Written Notice to Parents PR-01** form must be provided to the parents. See [IEP – 7.1 General](#).

Transfers from out of state

If the child moved into the district from another state, the district must provide the parents with a copy of the **procedural safeguards notice (Whose IDEA Is This?)**.

If the district determines that a new evaluation is necessary for a child who transfers from out of state, the evaluation is considered an initial evaluation and the district must provide the **Prior Written Notice to Parents PR-01** form and obtain written parental consent (**Parent Consent for Evaluation PR-05 form**). See [Evaluation – 6.2 Request and Referral for Initial Evaluation](#).

Transfers from out of district

If the child transfers into the district from another district in the state, the district provides the parents with a copy of the **procedural safeguards notice (Whose IDEA Is This?)** if the sending school district had not provided the parents with a copy during the current school year.

If the IEP team refers a child who transfers from another district in the state for additional evaluation, the evaluation is considered to be a reevaluation. The district must provide the **Prior Written Notice to the Parents PR-01** form and obtain written parental consent (**Parent Consent for Evaluation PR-05** form). See Evaluation – 6.5 Reevaluation.

11. Change of placement

The district must provide the **Prior Written Notice to Parents PR-01** form after an IEP meeting, if the parents do not agree with the IEP team's proposed change of placement on the continuum of alternative placement options. The district may not change the child's placement until the parents consent to the proposed change of placement.

12. Change in the type and amount of services

The district must provide the **Prior Written Notice to Parents PR-01** form after an IEP meeting, if the parents do not agree with the changes in the types and amount of services being proposed. The district may then proceed to implement the IEP.

13. Exit from special education

The district must provide the **Prior Written Notice to Parents PR-01** form whenever a child exits special education. In addition, for a child whose eligibility for special education terminates because the child is graduating with a regular diploma or exceeding the age eligibility for special education, the school district must provide the child with a **summary of the child's academic achievement and functional performance**, which shall include recommendations on how to assist the child in meeting the child's postsecondary goals.

14. District refuses services requested by parents

The district must provide the **Prior Written Notice to Parents PR-01** form to the parents any time the district refuses the request of the parents to provide special education and related services to the child.

15. District proposes/refuses to change disability category

The district must provide the **Prior Written Notice to Parents PR-01** form to the parents any time the district proposes or refuses to change the child's disability category. The ETR and the documentation of eligibility can be considered a prior written notice if all the elements required in a prior written notice are present in the ETR and determination of eligibility.

16. Releasing personally identifiable information

The district must obtain **written parental consent** prior to releasing any personally identifiable information about the child to any person or agency not entitled by law to see it, and to a representative of any participating agency that is likely to be responsible for providing or paying for transition services.

17. Destruction of personally identifiable information

The school district must inform the parents when personally identifiable information collected, maintained and used is no longer needed to provide educational services to the child. The information must be destroyed at the request of the parents. However, a permanent record of a child's name, address, telephone number, grades, attendance record, classes attended, grade level completed and year completed shall be maintained without time limitation. This **notification may be in writing or provided verbally**. If provided verbally, the school district should document this notification in the child's education record.

18. Transfer of parental rights

One year before the child's 18th birthday, the district must notify both the child and the parents of the parental rights, under Part B, that will transfer to the child upon reaching the age of majority. The district also must provide the child with a copy of the **procedural safeguards notice (Whose IDEA Is This?)**. This notification is documented on the child's **IEP PR-07** form.

19. Upon receipt of the first due process complaint or upon receipt of the first state complaint in the school year

The school district must give the parents a copy of the **procedural safeguards notice (Whose IDEA Is This?)** upon receipt of the parents' first due process request. The Ohio Department of Education, Office for Exceptional Children gives the parents a copy of the **procedural safeguards (Whose IDEA Is This?)** upon the parents' filing of the first state complaint within the school year.

20. Disciplinary change in placement

Whenever a change of placement occurs due to disciplinary action, a copy of the **procedural safeguards notice (Whose IDEA Is This?)** and **Prior Written Notice PR-01** form must be provided.

21. Revocation of consent (must be in writing)

The district must provide the **Prior Written Notice to Parents PR-01** form if the parents of a child with a disability revoke consent in writing for the continued provision of all special education and related services. This notice must include:

- A summary of all of the supports and services the child will no longer receive, and any change in educational placement that will occur as a result of the revocation of consent.
- Statements that once the revocation takes effect, the district will not be considered to be in violation of its requirement to make FAPE available, is not required to convene an IEP meeting or develop an IEP, is not required to conduct a three year reevaluation, is not required to offer the child the discipline protections available under IDEA and is not required to amend the child's education records to remove any reference to the child's receipt of special education and related services.
- A statement that by revoking consent for special education and related services for the child, the parent is not waiving the right to request an initial evaluation or to receive services in the future.



SPECIAL EDUCATION MODEL POLICIES AND PROCEDURES

Adopted on:

12-13-2023

Date

By:

Lakeshore Intergenerational School

District

July 1, 2009

INTRODUCTION

By adopting these Model Policies and Procedures, the _____ (the “District”) is adopting written policies and procedures regarding the manner in which the District fulfills its obligations under the Individuals with Disabilities Education Improvement Act of 2004 (IDEA) and the *Ohio Operating Standards for Ohio Educational Agencies Serving Children with Disabilities* (hereafter referred to as the “Operating Standards”). The Operating Standards require that the District adopt written policies and procedures in a number of different areas, and the District has chosen to adopt the model policies and procedures promulgated by the Ohio Department of Education’s Office for Exceptional Children (ODE-OEC) in order to satisfy these requirements of the Operating Standards.

This document, while comprehensive, does not include every requirement set forth in the IDEA, the regulations implementing IDEA, the Operating Standards, the Ohio Revised Code (ORC) and/or the Ohio Administrative Code (OAC). The District recognizes its obligation to follow these laws, regardless of whether their provisions are restated in the Model Policies and Procedures.

I. FREE APPROPRIATE PUBLIC EDUCATION (FAPE)

The District ensures that a free appropriate public education (FAPE) is made available to all children with disabilities between the ages of 3 and 21, inclusive, in accordance with IDEA and the Operating Standards.

A. RESIDENTIAL PLACEMENT

If the District places a child with a disability in a public or private residential program deemed necessary to provide special education and related services to a child with a disability, the program, including non-medical care and room and board, is at no cost to the parents of the child.

B. ASSISTIVE TECHNOLOGY

The District makes assistive technology available if required as part of the child's special education, related services or supplementary aids and services.

C. EXTENDED SCHOOL YEAR (ESY) SERVICES

The District ensures that extended school year services are provided if a child's individualized education program (IEP) team determines that the services are necessary for the provision of FAPE to the child. If a child is transitioning from Part C services, the District considers extended school year (ESY) services as part of the IEP process.

D. NONACADEMIC SERVICES

The District takes steps, including the provision of supplementary aids and services determined appropriate and necessary by the child's IEP team, to provide nonacademic and extracurricular services and activities in the manner necessary to afford children with disabilities an equal opportunity for participation in those services and activities as provided to students without disabilities.

Nonacademic and extracurricular services and activities include counseling services, athletics, transportation, health services, recreational activities, special interest groups or clubs sponsored by the school district, referrals to agencies that provide assistance to individuals with disabilities and employment of students, including both employment by the school district and assistance in making outside employment available.

E. PROGRAM OPTIONS AND PHYSICAL EDUCATION

The District takes steps to ensure that children with disabilities served by the District have available to them the variety of educational programs and services available to nondisabled

children served by the school district, including art, music, industrial arts, consumer and homemaking education and vocational education.

The District ensures that a child with a disability receives appropriate physical education services. The District affords each child with a disability the opportunity to participate in a regular physical education program available to non-disabled children, unless the child is enrolled full time in a separate facility or needs specially designed physical education, as prescribed in the child's IEP. The District provides a specially designed physical education program if prescribed by the IEP.

For preschool children, the District considers adapted physical education or related services, as appropriate, in conjunction with center-based or itinerant teacher services, and considers the factors set forth in 3301-51-11(F) of the Operating Standards.

F. TRANSPORTATION

The District provides, as a related service, transportation service in accordance with IDEA and the Operating Standards.

II. CONFIDENTIALITY

The District safeguards the confidentiality of personally identifiable information at use, collection, storage, retention, disclosure and destruction stages. In the District, _____ (name of responsible official) is responsible for maintaining the confidentiality of personally identifiable information. The District ensures that all persons collecting or using personally identifiable information receive training and instruction regarding the District's policies regarding that information. The District maintains for public inspection a current listing of the names and positions of those employees within the agency who may have access to personally identifiable information. The District gives notice to all parents of students receiving special education and related services that is adequate to fully inform parents about confidentiality requirements, in accordance with 3301-51-04(C) of the Operating Standards. The District also ensures that its contractors adhere to applicable confidentiality requirements.

A. ACCESS RIGHTS

The District permits parents (or a representative of a parent) to inspect and review any education records relating to their children that are collected, maintained, or used by the District. If any education record includes information on more than one child, the parents of those children have the right to inspect and review only the information relating to their child or to be informed of that specific information. The District does not charge a fee to search for or retrieve information. The District may charge a fee for copies of records, but does not charge a fee for copies of records that will effectively prevent the parents from exercising their right to inspect and review records.

The District complies with a request to access records without unnecessary delay and before any meeting regarding an IEP, or any hearing pursuant to 3301-51-05 of the Operating Standards, and any resolution session pursuant to 3301-51-05 of the Operating Standards, and in no case more than 45 days after the request has been made.

The District responds to reasonable requests for explanations and interpretations of the records, provides copies if failure to provide copies would effectively prevent the parent from exercising the right to inspect and review the records and permits a representative of a parent to inspect and review records.

The District presumes that a parent has the authority to inspect and review records relative to that parent's child unless the District has been advised that the parent does not have the authority under applicable state law governing such matters as guardianship, separation and divorce.

Upon request, the District provides parents a list of the types and locations of education records collected, maintained or used by the District.

The District keeps a record of parties obtaining access to education records collected, maintained or used under Part B of the IDEA (except access by parents and authorized employees of the

participating agency), including the name of the party, the date access was given and the purpose for which the party is authorized to use the records.

B. AMENDMENT OF RECORDS/HEARING PROCESS

If a parent requests the District to amend the information in the education records collected, maintained or used in the provision of special education or related services, the District decides whether to amend the information in accordance with the request within a reasonable period of time. If the District decides to refuse to amend the information in accordance with the request, it informs the parent of the refusal and advises the parent of the right to a hearing as set forth below and in 3301-51-04 of the Operating Standards.

(1) HEARING PROCEDURE

If the parent requests a hearing to challenge information in education records, the hearing is conducted in accordance with the procedures in 34 Code of Federal Regulations (C.F.R.) 99.22 (July 1, 2005) and within a reasonable period of time after the District receives the request. The hearing is conducted in accordance with the following procedures:

- (a) The parents shall be given notice of the date, time and place reasonably in advance of the hearing;
- (b) The records hearing shall be conducted by any individual, including an official of the District, who does not have a direct interest in the outcome of the hearing;
- (c) The parents shall be afforded a full and fair opportunity to present evidence relevant to the child's education records and the information the parent believes is inaccurate or misleading or violates the privacy or other rights of the child;
- (d) The parents may, at their own expense, be assisted or represented by one or more individuals of their choice, including an attorney;
- (e) The District makes its decision in writing within a reasonable period of time after the hearing; and
- (f) The decision is based solely upon the evidence presented at the hearing and includes a summary of the evidence and the reasons for the decision.

(2) RESULTS OF HEARING

If the District, as a result of the hearing, decides that the information is inaccurate, misleading or otherwise in violation of the privacy or other rights of the child, it amends the information accordingly and informs the parent in writing.

If the District, as a result of the hearing, decides that the information is not inaccurate, misleading or otherwise in violation of the privacy or other rights of the child, it must inform the parent of the parent's right to place in the child's records a statement commenting on the information or setting forth any reasons the parents disagree with the decision of the District.

Any explanation placed in the records of a child are:

- (a) Maintained by the District as part of the records of the child as long as the record or contested portion is maintained by the District; and

- (b) Disclosed any time the records of the child or the contested portion is disclosed by the District to any party.

C. PARENTAL CONSENT PRIOR TO DISCLOSURE OF RECORDS

The District obtains parental consent before personally identifiable information is disclosed to parties, other than officials of participating agencies in accordance as defined by 3301-51-04(B)(3) of the Operating Standards, unless the information is contained in education records and the disclosure is authorized without parental consent under the Family Educational Rights and Privacy Act of 1974, August 1974, 20 U.S.C. 1232g (FERPA).

The parent's consent must be in writing, signed and dated and must:

- (1) Specify the records to be disclosed;
- (2) State the purpose of the disclosure; and
- (3) Identify the party or class of parties to whom the disclosure may be made.

The District obtains parental consent, or the consent of an eligible child who has reached the age of majority under Ohio law, before personally identifiable information is released:

- (1) To officials of participating agencies providing or paying for transition services in accordance with 3301-51-07 of the Operating Standards;
- (2) To officials in another district or school in connection with the child's enrollment in a nonpublic school; and/or
- (3) For purposes of billing insurance and/or Medicaid.

D. TRANSFER OF RIGHTS AT AGE OF MAJORITY

The District affords rights of privacy to children similar to those afforded to parents, taking into consideration the age of the child and type or severity of disability.

The rights of parents regarding education records under FERPA transfer to the child at age 18.

If the rights accorded to parents under Part B of the IDEA are transferred to a child who reaches the age of majority (which is 18 in Ohio), the rights regarding education records also transfer to the child. See Chapter IV, Procedural Safeguards, Section G, regarding the transfer of rights under IDEA at the age of majority.

Once a child reaches the age of 17, the IEP must include a statement that the child has been informed regarding this transfer of rights.

E. DISCIPLINARY INFORMATION AND REPORTS TO LAW ENFORCEMENT

The District includes in the records of a child with a disability a statement of any current or previous disciplinary action that has been taken against the child and transmits the statement to

the same extent that disciplinary information is included in, and transmitted with, the records of nondisabled children.

When a child transfers from the District, the transmission of any of the child's records includes both the child's current IEP and any statement of current or previous disciplinary action that has been taken against the child.

A statement of disciplinary action shall:

- (1) Specify the circumstances that resulted in the disciplinary action and provide a description of the disciplinary action taken if the disciplinary action was taken because the child:
 - (a) Carried a weapon to or possessed a weapon at school, on school premises or to or at a school function;
 - (b) Knowingly possessed or used illegal drugs, or sold or solicited the sale of a controlled substance, while at school, on school premises or at a school function; or
 - (c) Inflicted serious bodily injury upon another person while at school, on school premises or at a school function; and
- (2) Include any information that is relevant to the safety of the child and other individuals involved with the child.

A statement of disciplinary action may include a description of any other behavior engaged in by the child that required disciplinary action, and a description of the disciplinary action taken.

If the District reports a crime to the appropriate law enforcement officials, the District transmits copies of the special education and disciplinary records of the child to those officials only to the extent that the transmission is permitted by FERPA and any other applicable laws.

F. DESTRUCTION OF RECORDS

The District informs parents when personally identifiable information is no longer needed to provide educational services to the child. If the parents request, the information is then destroyed. However, a permanent record of a student's name, address, telephone number, grades, attendance record, classes attended, grade level completed and year completed is maintained without time limitation.

III. CHILD FIND

In accordance with federal law, the District assumes responsibility for the location, identification and evaluation of all children birth through age 21 who reside within the district and who require special education and related services.

This includes students who are:

- (1) Advancing from grade to grade;
- (2) Enrolled by their parents in private elementary or private secondary schools, including religious schools, located in our District (regardless of the severity of their disability);
- (3) Wards of the state and children who are highly mobile, such as migrant and homeless children; and
- (4) Home-schooled.

A. RESPONSIBILITY FOR DETERMINING ELIGIBILITY

In the District, the Evaluation Team ensures that the student meets the eligibility requirements of IDEA and state regulations.

In all cases, the Evaluation Team will not determine that a student has a disability if the suspected disability is because of a lack of instruction in reading or math. If the student is not proficient in English, the District will not identify the student as disabled if the limited English proficiency (LEP) is the cause of the suspected disability.

B. CHILD IDENTIFICATION PROCESS

(1) GENERAL

The District has a child identification process that includes the location, identification and evaluation of a child suspected of having a disability. _____ (title of individual or department) coordinates the child identification process. The department and its staff use a variety of community resources and systematic activities in order to identify children requiring special services. District staff members consult with appropriate representatives of private school students attending private schools located in the District in carrying out this process. The District ensures that this process for students attending private or religious schools located in the District is comparable to activities undertaken for students with disabilities in the public schools.

(2) IDENTIFICATION OF CHILDREN BETWEEN THE AGES OF BIRTH TO AGE 3.

When the District becomes aware of a child between the ages of birth to 3 who has or may have a disability, it either:

- (a) Makes a child referral directly to the county family and children first council responsible for implementing the “Help Me Grow” (HMG) early intervention services under Part C of the IDEA; and/or

- (b) Provides the parents with the information so that they can make the referral themselves.

Parents may opt out of and/or opt not to be referred for Part C services. They may request an evaluation from the District to determine if their child has a disability that may require special education. These parents are entitled to an evaluation from the District, even if the child is between the ages of birth to 3. The District is responsible for providing an evaluation but is not responsible for the provision of FAPE for an eligible child until the child is age 3.

(3) TRANSITION TO SPECIAL EDUCATION FROM HELP ME GROW (HMG).

The District and the county family and children first council responsible for HMG have a current interagency agreement that includes processes for the referral of children from HMG to the District. The District has an assigned transition contact, _____, who is the primary person responsible for contact with HMG regarding children transitioning from that program.

- (a) If invited by a representative of HMG (and with parent permission), a District representative attends a transition conference to discuss transition from early intervention services to preschool for a child suspected of having a disability.
- (b) If the parents request, the District invites the Part C service coordinator to the initial IEP meeting.

If there is a suspected disability and the child is eligible for special education and related services as a preschool child, the District works to ensure that an IEP is in place and implemented by the child's third birthday. In the case of children who are 45 days or less from their 3rd birthdays and who are suspected of having disabilities, an evaluation is completed within 60 days of parental consent, but an IEP is not required by their third birthdays.

As part of the IEP process, the IEP team determines if extended school year services are required for the preschool child.

(4) COORDINATION WITH OTHER AGENCIES.

The District has interagency agreements with Head Start programs within the school district's service delivery that provide for:

- (a) Service coordination for preschool children with disabilities, 3 through 5 years of age, in a manner consistent with the state interagency agreement for service coordination with Head Start; and
- (b) Transition of children eligible for special education and related services as a preschool child at age 3.

The District also has interagency agreements with the relevant county board(s) of MR/DD for identification, service delivery and financial responsibilities to adequately serve preschool children with disabilities 3 through 5 years of age.

C. DATA COLLECTION

The District maintains an education management information system and submits data to ODE pursuant to rule 3301-14-01 of the Administrative Code. The District's collection of data includes information needed to determine if significant disproportionality based on race and ethnicity is occurring in the District with respect to the identification of children as children with disabilities, the placement of children in educational settings and the incidence, duration and type of disciplinary actions.

IV. Procedural Safeguards

A. PRIOR WRITTEN NOTICE

The District provides prior written notice as required by IDEA and Operating Standards. See Appendix A which summarizes the situations in which prior written notice is required. The District uses the form required by ODE-OEC Prior Written Notice PR-01.

(1) CONTENT OF PRIOR WRITTEN NOTICE

The prior written notice, in accordance with the IDEA regulations and the Operating Standards, includes the following information to ensure that parents are fully informed of the action being proposed or refused:

- (a) A description of the action proposed or refused by the District;
- (b) An explanation of why the District proposes or refuses to take this action;
- (c) A description of other options that the IEP team considered and the reasons why those options were rejected;
- (d) A description of each evaluation procedure, assessment, record or report that the District used as a basis for the proposed or refused action;
- (e) A description of other factors that are relevant to the District's proposal or refusal;
- (f) A statement that the parents of a child with a disability have procedural safeguards and, if the notice is not an initial referral for evaluation, the means by which a copy of the description of procedural safeguards can be obtained; and
- (g) Sources for parents to contact to obtain assistance in understanding the provisions of Ohio's rule regarding procedural safeguards.

(2) COMMUNICATION OF THE PRIOR WRITTEN NOTICE

The District provides the notice in the native language of the parents or other mode of communication used by the parents unless it is clearly not feasible to do so.

If the native language or other mode of communication is not a written language, the District takes steps to have the notice translated orally or by other means to the parent in the parent's native language or other mode of communication. The District takes steps to ensure that such parents understand the content of the notice and maintains written evidence that both requirements set forth in this paragraph, if applicable, have been met.

The District may provide the prior written notice, procedural safeguards notice and the notification of a due process complaint by e-mail if the parents choose to receive the notices electronically.

B. PROCEDURAL SAFEGUARDS NOTICE

Parents of a child with a disability are entitled to specific procedural safeguards under IDEA and the Operating Standards.

Whose IDEA Is This? A Parent's Guide to the Individuals with Disabilities Education Improvement Act of 2004, developed by ODE-OEC, includes a full explanation of these procedural safeguards as required by IDEA and 3301-51-02, 3301-51-04 and 3301-51-05 of the Operating Standards.

The District provides parents with a copy of *Whose IDEA Is This?* at least once a year. This includes:

- (1) Providing a copy to the parents of a child who transfers into the District from out-of-state; and
- (2) Providing a copy to the parents of a child who transfers into the District from an in-state school if the sending District has not provided a copy to the parents during the current school year.

In addition, the District provides parents with a printed copy of this procedural safeguards notice in each of the following circumstances:

- (1) The initial referral or parental request for evaluation;
- (2) The receipt of the first due process complaint in a school year;
- (3) A change in placement for disciplinary action; and
- (4) When requested by the parents or the child who has reached the age of majority.

In providing *Whose IDEA is This?*, the District follows the procedures for communication that are described above under Prior Written Notice.

C. PARENTAL CONSENT

Consent means that the parents:

- (a) Have been fully informed, in the parents' native language or other mode of communication, of all information relevant to the activity for which consent is sought;
- (b) Understand and agree in writing to the carrying out of the activity for which the consent was asked. The consent describes that activity and lists the records (if any) that will be released and to whom they will be released; and
- (c) Understand that the granting of consent is voluntary and may be revoked at any time.

(1) ACTIONS REQUIRING INFORMED WRITTEN PARENTAL CONSENT

The District obtains written consent from the parents before:

- (a) Conducting an initial evaluation to determine if a child is eligible for special education;
- (b) Initially providing special education and related services;
- (c) Conducting a reevaluation when assessments are needed;
- (d) Making a change in placement on the continuum of alternative placement options (i.e., regular classes, special classes, special schools, home instruction and instruction in hospitals and institutions); and
- (e) Releasing personally identifiable information about the child to any person other than a person authorized to obtain those records without parental consent pursuant to FERPA. For example, parental consent is obtained prior to releasing records to a representative of

an agency that is likely to be responsible for providing or paying for transition services or for the purposes of billing Medicaid.

The District uses the ODE-OEC required Consent for Evaluation PR-05 form to obtain written parental consent for evaluation and reevaluation and the required IEP PR-07 form to obtain written parental consent for the initial provision of special education and related services and for making a change in placement.

The District does not obtain written parental consent when reviewing existing data as part of an evaluation or reevaluation or when administering a test or evaluation that is given to all children, unless consent is required of all parents.

(2) CHANGE IN PLACEMENT

Once the District receives the initial parental consent for special education and related services, the District must obtain consent only for a change in placement. A “change of placement” means a change from one option on the continuum of alternative placements to another (instruction in regular classes, special schools, home instruction and instruction in hospitals and institutions).

If the District cannot obtain parental consent, it may file a due process complaint requesting a due process hearing or engage in conflict resolution to obtain agreement or a ruling that the placement may be changed.

(3) PARENTS’ FAILURE TO RESPOND OR REFUSAL TO PROVIDE CONSENT

The District makes “reasonable efforts” to contact parents and obtain written parental consent that may include:

- (a) Written correspondence;
- (b) Phone calls;
- (c) Electronic mail communications, to include but not limited to e-mail and password-protected parent pages; and/or
- (d) Visits to the home or parents’ places of employment.

The District documents its attempts. If the parents fail to respond or refuse to provide consent, the District proceeds as follows:

(4) INITIAL EVALUATION

If the parents fail to respond to the District’s efforts to obtain consent or refuse consent for the initial evaluation, the District may:

- (a) Request a due process hearing and engage in conflict resolution (e.g., resolution meeting and/or mediation) to convince the parents to provide their consent; or
- (b) Decide not to pursue the initial evaluation and provide the parents with prior written notice.

If the child is being home schooled or has been placed in a private school at the parents' expense, the District cannot file a due process complaint or request the parents to participate in a resolution meeting and/or mediation.

(5) REEVALUATION

If the parents fail to respond to the District's efforts to obtain consent for a reevaluation when assessments are needed, the District proceeds with the reevaluation.

If the parents expressly refuse consent for a reevaluation when assessments are needed, the District may:

- (a) Agree with the parents that a reevaluation is unnecessary;
- (b) Conduct a reevaluation by utilizing data and/or documentation that the District already possesses;
- (c) Request a due process hearing and engage in conflict resolution (e.g., resolution meeting and/or mediation) to convince the parents to provide their consent; or
- (d) Decide not to pursue having the child reevaluated.

The District continues to provide FAPE to the child if the District agrees with the parents that a reevaluation is unnecessary.

(6) INITIAL PROVISION OF SPECIAL EDUCATION AND RELATED SERVICES

If the parents do not attend the IEP meeting to develop the IEP for the initial provision of services, the District attempts to obtain written parental consent through other methods such as calling the parents, corresponding with the parents and or visiting the parents.

If the parents expressly refuse consent, as evidenced by their signatures on the IEP indicating that consent is not given, the District maintains a copy of the signed IEP showing that the District offered FAPE.

If the parents fail to respond or refuse consent, the District provides the parents with prior written notice and continues to provide the child with appropriate interventions in the regular education classroom. The District may not request a due process hearing or engage in conflict resolution to obtain agreement or a ruling that services may be provided to the child.

The District does not use the parents' refusal to consent to one service or activity to deny the parents or the child any other service, benefit or activity in the District, except in those instances in which IDEA authorizes that denial.

(7) REVOCATION OF CONSENT

The parents may revoke consent for and remove the child from special education and related services. Once the District receives written revocation of consent, it provides the parents with prior written notice and continues to provide the child with appropriate interventions through the regular education environment.

The District is not required to amend the child's education records to remove any references to the child's receipt of special education and related services because of the revocation of consent.

If a parent has provided written revocation of consent, the District does not file a due process complaint or engage in conflict resolution to attempt to obtain agreement or a ruling that special education and related services may be provided to the child.

D. INDEPENDENT EDUCATIONAL EVALUATION

Parents who disagree with an evaluation that was completed or obtained by the District may request an independent educational evaluation at public expense. Parents are entitled to request only one independent educational evaluation at public expense each time the District conducts an evaluation with which the parents disagree.

(1) INDEPENDENT EDUCATIONAL EVALUATION AT PUBLIC EXPENSE

If the parents request an independent educational evaluation at public expense, the District either:

- (a) Ensures that an independent evaluation is provided at public expense; or
- (b) Files a due process complaint requesting a hearing to show that the District's evaluation is appropriate.

If the District files a due process complaint and the final decision is that the District's evaluation is appropriate, the parent still has the right for an independent educational evaluation, but not at the public expense.

(2) PARENT INITIATED EVALUATIONS

If a parent obtains an independent educational evaluation at public expense or shares with the District an evaluation obtained at private expense, the District considers that evaluation, if it meets District criteria, in any decision made with respect to the provision of FAPE to the child.

(3) DISTRICT CRITERIA

If an independent educational evaluation is at public expense, the criteria under which the evaluation is obtained, including the location of the evaluation and the qualifications of the examiner, must be the same as the criteria which the District uses when it initiates an evaluation, to the extent those criteria are consistent with the parent's right to an independent educational evaluation. Except for the above-mentioned criteria, the District does not impose conditions or timelines related to obtaining an independent educational evaluation at public expense.

E. CONFLICT RESOLUTION

(1) ADMINISTRATIVE REVIEWS

Within 20 days of receipt of a complaint from a child's parents or another educational agency, the District's superintendent, or the superintendent's designee, conducts a review, may hold an administrative hearing and notifies all parties of the decision in writing.

- (a) All parties have the right to invite others, including legal counsel, to participate in the review.
- (b) The review is conducted at a time and place convenient to all parties.
- (c) Every effort is made to resolve any disagreements at the administrative review.

(2) MEDIATION

At its discretion, the District participates in the resolution of disputes with other parties through the voluntary mediation processes available through ODE-OEC.

(3) IMPARTIAL DUE PROCESS HEARING/RESOLUTION MEETINGS

Due process complaints filed against the District proceed in the manner set forth in 3301-51-05(K) of the Operating Standards.

The District convenes a resolution meeting before the initiation of a due process hearing. The resolution meeting:

- (a) Occurs within 15 days of the receipt of notice of the parents' due process complaint;
- (b) Includes a representative of the District who has decision-making authority on behalf of the District;
- (c) Does not include the District's attorney unless the parents are accompanied by an attorney;
- (d) Provides an opportunity for the parents to discuss their due process complaint and the facts the complaint is based on; and
- (e) Provides the District an opportunity to resolve the dispute.

The District does not hold a resolution meeting if the parents and the District agree in writing to waive the meeting or agree to use the mediation process. Also, if the District files the due process complaint, it is not required to hold a resolution meeting.

The District, if it is the child's school district of residence, is responsible for conducting the impartial due process hearing utilizing the hearing officer appointed by ODE-OEC. The District follows the procedures required by 3301-51-05(K)(10)–(15) of the Operating Standards when conducting a hearing at a time and place that is reasonably convenient to the parents and the child involved.

If the parents request to inspect and review any education records relating to their child, the District replies without unnecessary delay and makes the records available before the hearing.

The District provides the parents with one copy of the written, or at the option of the parents, an electronic verbatim record of the hearing and findings of fact and decision at no cost. The decision is final except that any party to the hearing may appeal the decision to ODE-OEC.

The District pays for the costs incurred for the hearing except for expert testimony, outside medical evaluations, witness fees, subpoena fees and cost of counsel requested by the other party to the hearing and compensates the hearing officer as provided in 3301-51-05(K)(16)(d) of the Operating Standards. If the hearing was requested by another agency, the District shares the costs of the hearing except for the costs identified in the preceding sentence.

Any further appeals or actions proceed in accordance with 3301-51-05 of the Operating Standards.

F. CHILD'S STATUS DURING DUE PROCESS PROCEEDINGS/CODE OF CONDUCT VIOLATIONS

(1) CHILD'S STATUS DURING DUE PROCESS PROCEEDINGS

The District ensures that a child remains in the current educational placement during the pendency of any administrative or judicial proceeding regarding a due process complaint, unless the state or the District and the parents of the child agree otherwise. If the state level review officer agrees with the child's parents that a change in placement is appropriate, that placement is treated as an agreement between the state and the parents.

If the complaint involves an application for initial admission to the District, the child, with the consent of the parents, is placed in the District until the completion of all proceedings.

If the complaint involves an application for services from a child who is transitioning from Part C to Part B, the District provides those special education and related services that are not in dispute, if the child is found eligible for special education and related services under Part B and the parent consents to the initial provision of special education and related services.

(2) DISCIPLINARY PROCEEDINGS

The District may consider any unique circumstances on a case-by-case basis when determining whether a change in placement, consistent with the other requirements of 3301-51-05 of the Operating Standards, is appropriate for a child with a disability who violates a code of student conduct.

(a) Changes in placement less than 10 consecutive school days

The District may remove a child with a disability who violates a code of student conduct from the child's current placement to an appropriate interim alternative educational setting, another setting, or suspension, for not more than 10 consecutive school days (to the extent those alternatives are applied to children without disabilities), and for additional removals of not more

than 10 consecutive school days in that same school year for separate incidents of misconduct (as long as those removals do not constitute a change of placement).

The District considers on a case-by-case basis whether a pattern of removals constitutes a change of placement. A change in placement occurs if:

- (1) The removal is for more than 10 consecutive school days, **or**
- (2) The child has been subjected to a series of removals that constitute a pattern:
 - (a) Because the series of removals totals more than 10 school days in a school year;
 - (b) Because the child's behavior is substantially similar to the child's behavior in previous incidents that resulted in the series of removals; and
 - (c) Because of such additional factors as the length of each removal, the total amount of time the child has been removed and the proximity of the removals to one another.

(b) Services during removal from current placement

The District provides services to a child removed from the child's current placement as follows:

- (1) If the child has been removed from the child's current placement for 10 school days or less in the school year, services are provided only to the extent that services are provided to a child without disabilities who is similarly removed;
- (2) After a child with a disability has been removed from the child's current placement for 10 school days in the same year (under circumstances in which the current removal is for not more than 10 consecutive days and is **not** a change in placement), the District provides services, as determined by school personnel in consultation with at least one of the child's teachers, so as to enable the child to continue to participate in the general education curriculum, although in another setting, and to progress toward meeting the goals set out in the child's IEP;
- (3) If the removal is a change in placement, the child's IEP team determines appropriate services; and
- (4) If a child with a disability is removed from the child's current placement for either more than 10 consecutive days for behavior that is determined **not** to be a manifestation of the child's disability or under circumstances that constitute special circumstances, as defined below, the District ensures that the child:
 - (a) Continues to receive educational services so as to enable the child to continue to participate in the general education curriculum, although in another setting, and to progress toward meeting the goals set out in the child's IEP; and
 - (b) Receives, as appropriate, a functional behavioral assessment and behavioral intervention services and modifications that are designed to address the behavior violation so that it does not recur.

(c) Manifestation determination

Within 10 school days of any decision to change the placement of a child with a disability because of a violation of a code of student conduct, the school district, the parent and relevant members of the child's IEP team (as determined by the parent and the school district) must review all relevant information in the child's file, including the child's IEP, any teacher observations and any relevant information provided by the parents to determine if the conduct

was a manifestation of the child's disability. The District determines that the conduct is a manifestation of the child's disability:

- (1) If the conduct in question was caused by, or had a direct and substantial relationship to, the child's disability; or
- (2) If the conduct in question was the direct result of the school district's failure to implement the IEP.

If the District, parents and relevant members of the IEP team determine that the conduct in question was the direct result of the school district's failure to implement the IEP, the District takes immediate steps to remedy those deficiencies.

- (1) If the conduct was a manifestation of the child's disability, the IEP team either:
 - (a) Starts to conduct a functional behavioral assessment within 10 days of the manifestation determination and complete the assessment as soon as practicable, unless the school district had conducted a functional behavioral assessment before the behavior that resulted in the change of placement occurred, and implemented a behavioral intervention plan for the child; **or**
 - (b) If a behavioral intervention plan already has been developed, within 10 days of the manifestation determination, reviews the behavioral intervention plan and the implementation of the plan, and modifies it, as necessary, to address the behavior subject to disciplinary action; **and**
- (2) Returns the child to the placement from which the child was removed, unless the parent and the District agree to a change of placement as part of the modification of the behavioral intervention plan.

(d) Special circumstances.

The District may remove a child to an interim alternative educational setting for not more than 45 school days without regard to whether the behavior is determined to be a manifestation of the child's disability, if the child:

- (1) Carries a weapon to or possesses a weapon at school, on school premises, or to or at a school function under the jurisdiction of ODE or a school district;
- (2) Knowingly possesses or uses illegal drugs, or sells or solicits the sale of a controlled substance, while at school, on school premises, or at a school function under the jurisdiction of ODE or a school district; or
- (3) Has inflicted serious bodily injury upon another person while at school, on school premises, or at a school function under the jurisdiction of ODE or a school district.

The District defines the terms controlled substance, weapon, illegal drug and serious bodily injury in accord with 3301-51-05(K)(20)(h)(i) of the Operating Standards.

On the date on which the decision is made to make a removal that constitutes a change of placement of a child with a disability because of a violation of a code of student conduct, the school district must notify the parents of that decision and provide the parents with the procedural safeguards notice described in Section B above.

(e) Expedited Due Process Hearing

The District or the parents may submit a due process complaint requesting an expedited due process hearing to appeal a decision made during disciplinary procedures.

- (1) The District may request a an expedited due process hearing if it believes that maintaining the current placement of a child is substantially likely to result in injury to the child or to others.
- (2) The parents may request an expedited due process hearing to appeal decisions regarding placement for disciplinary removals or the manifestation determination.

The District is responsible for conducting the expedited due process hearing utilizing the hearing officer appointed by ODE-OEC. The District follows the procedures that apply for other due process hearings except that the expedited due process hearing must occur within 20 school days after the date the due process complaint is filed and no extensions of time shall be granted. The hearing officer then must make a determination within 10 school days after the hearing. The District follows the expedited timelines and the procedures set forth in 3301-51-05(K)(22)(c)-(d) of the Operating Standards.

G. TRANSFER OF PARENTAL RIGHTS AT AGE OF MAJORITY/STUDENT NOTIFICATION

Once a child reaches the age of majority, the District sends all required notices to both the student and parent, unless the student has been determined incompetent under state law. If a child with a disability is incarcerated in an adult or juvenile correctional institution, prior written notices are provided to both the parents and the student.

One year before the child's 18th birthday, the District notifies both the parents and the child of the parental rights that will transfer to the child upon reaching the age of majority (age 18) and provides the child with a copy of *Whose IDEA Is This?* The District documents this notice on the child's IEP PR-07 form.

Once the child turns 18, the District obtains informed written consent, as required by the Operating Standards, from the student, unless the student has been determined incompetent under state law.

H. SURROGATE PARENTS

The District ensures that the rights of a child are protected when:

- (1) No parent, as defined in 3301-51-01 of the Operating Standards, can be identified;
- (2) The District, after making reasonable efforts, cannot locate a parent;
- (3) The child is a ward of the state; or
- (4) The child is an unaccompanied homeless youth as defined by 3301-51-05(E)(1)(d) of the Operating Standards.

One way in which the District protects the rights of such children is through the assignment of surrogate parents where appropriate. The District has a method for determining when a child needs a surrogate parent and for assigning a surrogate parent to the child, and complies with the requirements of 3301-51-05(E) of the Operating Standards regarding surrogate parents.

V. EVALUATION

The District ensures that initial evaluations are conducted and that reevaluations are completed for children residing within the District. The District uses a referral process to determine whether or not a child is a child with a disability. The District also provides interventions to assist a child who is performing below grade-level standards. The provision of intervention services is not used to unnecessarily delay a child's evaluation for purposes of determining eligibility for special education services.

A. INITIAL EVALUATION

1. TIMING AND INITIATION

The district conducts an evaluation before the initial provision of special education and related services. Either a parent of a child or a public agency may initiate a request for an initial evaluation to determine if the child is a child with a disability.

Within 30 days of receipt of a request for an evaluation, the District either obtains parental consent for an initial evaluation or provides to the parents prior written notice stating that the school district does not suspect a disability and will not be conducting an evaluation.

The initial evaluation:

- (a) Is conducted within 60 days of receiving parental consent for the evaluation unless the exception set forth in 3301-51-06(B)(5) of the Operating Standards applies; and
- (b) Consists of procedures:
 - (i) To determine if the child is a child with a disability as defined in 3301-51-01(B)(10) of the Operating Standards; and
 - (ii) To determine the educational needs of the child.

The district obtains parental consent before conducting an evaluation. See Chapter IV, Section C, regarding parental consent requirements.

The evaluation team consists of the IEP team and other qualified professionals.

2. THE EVALUATION PLAN AND EVALUATION TEAM REPORT

As part of the initial evaluation, if appropriate, and as part of any reevaluation, the evaluation team shall develop an evaluation plan that will provide for the following and be summarized in an evaluation team report:

- (a) Review of existing evaluation data on the child, including:
 - (i) Evaluations and information provided by the parents of the child;
 - (ii) Current classroom-based, local or state assessments and classroom-based observations;
 - (iii) Observations by teachers and related services providers;
 - (iv) Data about the child's progress in the general curriculum, or, for the preschool-age child, data pertaining to the child's growth and development;

- (v) Data from previous interventions, including:
 - (a) Interventions required by rule 3301-51-06 of the Operating Standards and
 - (b) For the preschool child, data from early intervention, community, or preschool program providers; and
- (vi) Any relevant trend data beyond the past twelve months, including the review of current and previous IEPs; and
- (b) On the basis of that review and input from the child's parents, identify what additional data, if any, are needed to determine:
 - (i) Whether the child is a child with a disability, as defined in 3301-51-01 of the Operating Standards, and the educational needs of the child;
 - (ii) In the case of a reevaluation of a child, whether the child continues to have such a disability and the educational needs of the child;
 - (iii) The present levels of academic achievement and related developmental needs of the child;
 - (iv) Whether the child needs special education and related services; or
 - (v) In the case of a reevaluation of a child, whether the child continues to need special education and related services; and
 - (vi) Whether any additions or modifications to the special education and related services are needed to enable the child to meet the measurable annual goals set out in the IEP of the child and to participate, as appropriate, in the general education curriculum.

The District administers such assessments and other evaluation measures as may be needed to produce the data identified above. The district provides prior written notice to the parents of a child with a disability that describes any evaluation procedures the school district proposes to conduct.

3. CONDUCT OF EVALUATION

In conducting the evaluation, the District:

- (a) Uses a variety of assessment tools and strategies to gather relevant functional, developmental and academic information about the child, including information provided by the parent, that may assist in determining:
 - (i) Whether the child is a child with a disability as defined in 3301-51-01(B)(10) of the Operating Standards; and
 - (ii) The content of the child's IEP, including information related to enabling the child to be involved in and progress in the general education curriculum (or for a preschool child to participate in appropriate activities);
- (b) Does not use any single measure or assessment as the sole criterion for determining whether a child is a child with a disability and for determining an appropriate educational program for the child; and
- (c) Uses technically sound instruments that may assess the relative contribution of cognitive and behavioral factors, in addition to physical or developmental factors.

The District ensures that:

- (a) Assessments and other evaluation materials used to assess a child:
 - (i) Are selected and administered so as not to be discriminatory on a racial or cultural basis;
 - (ii) Are provided and administered in the child's native language or other mode of communication and in the form most likely to yield accurate information about what the child knows and can do academically, developmentally and functionally, unless it is clearly not feasible to so provide or administer;
 - (iii) Are used for the purposes for which the assessments or measures are valid and reliable;
 - (iv) Are administered by trained and knowledgeable personnel; and
 - (v) Are administered in accordance with any instructions provided by the producer of the assessments.
- (b) Assessments and other evaluation materials include those tailored to assess specific areas of educational need and not merely those that are designed to provide a single general intelligence quotient.
- (c) Assessments are selected and administered so as best to ensure that if an assessment is administered to a child with impaired sensory, manual or speaking skills, the assessment results accurately reflect the child's aptitude or achievement level or whatever other factors the test purports to measure rather than reflecting the child's impaired sensory, manual or speaking skills (unless those skills are the factors that the test purports to measure);
- (d) A school age child is assessed in all areas related to the suspected disability, including, if appropriate, health, vision, hearing, social and emotional status, general intelligence, academic performance, communicative status and motor abilities;
- (e) Preschool children are assessed in the following developmental areas: adaptive behavior, cognition, communication, hearing, vision, sensory/motor function, social-emotional functioning and behavioral function.
- (f) Assessments of children with disabilities who transfer from one school district to another school district in the same school year are coordinated with the children's prior and subsequent schools, as necessary and as expeditiously as possible, consistent with 3301-51-06(B)(5)(b) and (B)(6) of the Operating Standards, to ensure prompt completion of the full evaluations.
- (g) In evaluating each child with a disability under 3301-51-06(E)-(G) of the Operating Standards, the evaluation is sufficiently comprehensive to identify all of the child's special education and related services needs, whether or not commonly linked to the disability category in which the child has been classified.
- (h) Assessment tools and strategies that provide relevant information that directly assists persons in determining the educational needs of the child are provided.
- (i) Medical consultation shall be encouraged for a preschool or school-age child on a continuing basis, especially when school authorities feel that there has been a change in the child's behavior or educational functioning or when new symptoms are detected; and
- (j) For preschool-age children, as appropriate, the evaluation shall include the following specialized assessments:

- (i) Physical examination completed by a licensed doctor of medicine or doctor of osteopathy in cases where the disability is primarily the result of a congenital or acquired physical disability;
- (ii) Vision examination conducted by an eye care specialist in cases where the disability is primarily the result of a visual impairment; and
- (iii) An audiological examination completed by a certified or licensed audiologist in cases where the disability is primarily the result of a hearing impairment.

B. ELIGIBILITY DETERMINATION AND EVALUATION TEAM REPORT

1. COMPLETION OF THE EVALUATION TEAM REPORT

The following occurs upon completion of the administration of assessments and other evaluation measures:

- (a) The IEP team and other qualified professionals and the parent of the child determines whether the child is a child with a disability, in accordance with the Operating Standards; and
- (b) The District provides a copy of the evaluation report and the documentation of determination of eligibility at no cost to the parent.

The written evaluation team report shall include:

- (a) A summary of the information obtained during the evaluation process; and
- (b) The names, titles and signatures of each team member, including the parent, and an indication of whether or not they are in agreement with the eligibility determination. Any team member who is not in agreement with the team's determination of disability shall submit a statement of disagreement.

The District provides a copy of the evaluation team report and the documentation of determination of eligibility or continued eligibility to the parents prior to the next IEP meeting and in no case later than 14 days from the date of eligibility determination.

2. DETERMINATION OF ELIGIBILITY

A child is not determined to be a child with a disability:

- (a) If the determinant factor for that determination is:
 - (i) Lack of appropriate instruction in reading, including the essential components of reading instruction as defined in Section 1208(3) of the Elementary and Secondary Act of 1965, as amended and specified in the No Child Left Behind Act of 2002, January 2002, 20 U.S.C. 6301 (ESEA);
 - (ii) Lack of appropriate instruction in math; or
 - (iii) LEP; and
- (b) If the child does not otherwise meet the eligibility criteria under 3301-51-01(B)(10) of the Operating Standards.

The district, in interpreting evaluation data for the purpose of determining if a child is a child with a disability, does the following:

- (a) Draws upon information from a variety of sources, including aptitude and achievement tests, state and district wide assessments, parent input and teacher recommendations, as well as information about the child's physical condition, social or cultural background and adaptive behavior; and
- (b) Ensures that information obtained from all of these sources is documented and carefully considered.

If a determination is made that a child has a disability and needs special education and related services, the District develops an IEP for the child.

C. REEVALUATIONS

The District conducts reevaluations of a child with a disability:

- (a) If the District determines that the child's educational or related services needs, including improved academic achievement and functional performance, warrant a reevaluation; or
- (b) If the child's parent or teacher requests a reevaluation; or
- (c) When a child transitions from pre-school to school-aged services; or
- (d) In order to make a change in disability category.

A reevaluation may not occur more than once a year, unless the parent and the District agree otherwise.

A reevaluation must occur at least once every three years, unless the parent and the District agree that a reevaluation is unnecessary.

The District evaluates a child with a disability before determining that child is no longer a child with a disability, although this evaluation is not required if the child's eligibility terminates due to graduation from secondary school with a regular diploma or due to exceeding the age eligibility for FAPE under state law. If a child's eligibility terminates for one of these reasons, the District provides the child with a summary of the child's academic achievement and functional performance, which shall include recommendations on how to assist the child in meeting the child's postsecondary goals.

D. IDENTIFYING CHILDREN WITH SPECIFIC LEARNING DISABILITIES (SLD)

The District has written procedures for the implementation of the evaluation process the District uses to determine the existence of a specific learning disability (SLD). In addition, the District uses the form required by ODE-OEC, Evaluation Team Report PR-06 and completes Part 3: Documentation for Determining the Existence of a Specific Learning Disability of PR-06 when the District suspects the child has a SLD.

(1) DETERMINING THE EXISTENCE OF A SPECIFIC LEARNING DISABILITY

The parents, the IEP team, and a group of qualified professionals from the District determine that a child has a SLD if:

- (a) The child does not achieve adequately for the child's age or to meet state-approved grade-level standards in one or more of the following areas, when the District provides learning experiences and instruction appropriate for the child's age or state-approved grade-level standards:
 - (i) Oral expression;
 - (ii) Listening comprehension;
 - (iii) Written expression;
 - (iv) Basic reading skill;
 - (v) Reading fluency skills;
 - (vi) Reading comprehension;
 - (vii) Mathematics calculation; or
 - (viii) Mathematics problem-solving;

AND

- (b) The child does not make sufficient progress to meet age or state-approved grade-level standards in one or more of the areas identified in number 1, above, when the District uses an evaluation process to determine the child's response to scientific, research-based intervention;

OR

- (c) The child exhibits a pattern of strengths and weaknesses in performance, achievement, or both, relative to age, state-approved grade-level standards, or intellectual development, when the District uses appropriate assessments consistent with 3301-51-06(E) and (F) of the Operating Standards that the group has determined to be relevant to the identification of a SLD.

Alternatively, the District may choose a third method of evaluation, for determining if a child has a SLD. The District seeks prior approval from ODE-OEC if it chooses to use an alternative research-based assessment procedure to determine if a child has a SLD.

(2) USE OF AN EVALUATION PROCESS BASED ON THE CHILD'S RESPONSE TO SCIENTIFIC, RESEARCH-BASED INTERVENTION FOR SLD DETERMINATION

If the District uses an evaluation process based on the child's response to scientific, research-based intervention to determine whether a child has a SLD. The District ensures that this process:

- (a) Begins when the District has gathered and analyzed sufficient data from scientifically-based instruction and targeted and intensive individualized interventions that provide evidence that the child's needs are unlikely to be met without certain specialized instruction, in addition to the regular classroom instruction;
- (b) Employs interventions that are scientifically-based and provided at appropriate levels of intensity, frequency, duration and integrity, relative to the child's identified needs;

- (c) Is based on results of scientifically-based, technically adequate assessment procedures that assess ongoing progress while the child is receiving scientifically-based instruction and the results of these procedures have been reported to the child's parents; and
- (d) Includes the analysis of data described in 3301-51-06(H)(3)(b)(i) and (H)(3)(b)(ii) of the Operating Standards to determine whether a discrepancy is present between the child's actual and expected performance, in both the child's rate of progress in developing skills, and in the child's level of performance on measures assessing one or more of the academic areas listed in 3301-51-06(H)(3)(a)(i) of the Operating Standards

The District will not use this process to delay unnecessarily a child's referral for a comprehensive evaluation to determine eligibility for special education services.

(3) ADDITIONAL REQUIREMENTS FOR SLD DETERMINATION

The District ensures that the following additional requirements are satisfied when determining if a child has a SLD:

Inclusion of additional required group members for SLD determination

The group that determines that a child suspected of having a SLD is a child with a disability includes the child's parents and a group of qualified professionals consisting of, but not limited to:

- (a) In the case of a school-age child, the child's regular teacher (or if the child does not have a regular teacher, the District includes a regular classroom teacher qualified to teach a child of the child's age);
- (b) In the case of children less than school-age, an individual qualified by ODE to teach a child of the child's age; and

At least one person qualified to conduct individual diagnostic examinations of children, such as a school psychologist, speech-language pathologist or remedial reading teacher.

Observation requirements

The District ensures that the child is observed in the child's learning environment, including the regular classroom setting, to document the child's academic performance and behavior in the areas of difficulty. The group of qualified professionals identified by the District conducts the observation by:

- (a) Using information from an observation of the child's performance conducted during routine classroom instruction, including monitoring of the child's performance during instruction, that was done before the child was referred for an evaluation; or
- (b) Having at least one member of the group conduct an observation of the child's academic performance in the regular classroom after the child has been referred for an evaluation and parent consent has been obtained.

In the case of a child of less than school-age or a child who is out of school, the District ensures that a group member observes the child in an environment appropriate for a child of that age.

Ensuring the child's underachievement is not due to a lack of appropriate instruction in reading and math

In order to ensure that underachievement in a child suspected of having a SLD is not due to lack of appropriate instruction in reading or math, the District considers:

- (a) Data demonstrating that prior to, or as part of, the referral process, the child received appropriate instruction in regular education settings delivered by qualified personnel; and
- (b) Data-based documentation of repeated assessments of achievement at reasonable intervals, reflecting formal assessment of the child's progress during instruction, the results of which were provided to the child's parents.

Obtaining parental consent to evaluate

The District promptly requests parental consent to evaluate a child to determine if the child needs special education and related services:

- (a) If prior to the referral, the child does not make adequate progress after an appropriate period of time when provided with appropriate instruction. To make this determination, the District considers:
 - (i) Data demonstrating that prior to, or as part of, the referral process, the child received appropriate scientifically-based instruction in regular education settings delivered by qualified personnel; and
 - (ii) Data-based documentation of repeated assessments of achievement at reasonable intervals, reflecting formal assessment of the child's progress during instruction, the results of which were provided to the child's parents; and
- (b) Whenever a child is referred for an evaluation.

Consideration of exclusionary factors

When determining that a child has a SLD, the District ensures that the findings from the evaluation process are not primarily the result of:

- (a) A visual, hearing, or motor disability;
- (b) Mental retardation;
- (c) Emotional disturbance;
- (d) Cultural factors;
- (e) Environmental or economic disadvantage; or
- (f) LEP.

If the District determines that one of these factors is the primary reason for the child's suspected disability, the District does not identify the child as having a SLD.

VI. INDIVIDUALIZED EDUCATION PROGRAMS (IEPs)

The District ensures that an IEP is developed and implemented for each child with a disability, ages 3 through 21, inclusive, who requires special education and related services and who resides in the district. For all children with disabilities for whom our district is the district of residence, the District is responsible for ensuring that the requirements of 3301-51-07 of the Operating Standards are met regardless of which district, county board of MR/DD, or other educational agency implements the child's IEP.

The meeting to develop an IEP is conducted within 30 days of a decision that a child needs special education and related services.

The initial IEP is developed within whichever of the following time periods is the shortest:

- (a) Within 30 calendar days of the determination that the child needs special education and related services;
- (b) Within 90 days of receiving informed parental consent for an evaluation; or
- (c) Within 120 calendar days of receiving a request for an evaluation from a parent or school district (unless the evaluation team has determined it does not suspect a disability).

The District ensures that the parents receive a copy of the child's IEP at no cost to the parents. The parents may receive a copy of the IEP either at the conclusion of the IEP meeting or within 30 calendar days of the date of the IEP meeting.

A. MEMBERS OF THE IEP TEAM

The IEP team includes:

- (1) The child's parents;
- (2) Not less than one of the child's regular education teachers, if the child is or may be participating in the regular education environment;
- (3) Not less than one special education teacher of the child or, where appropriate, not less than one special education provider of the child;
- (4) A representative of the school district who:
 - a) Is qualified to provide, or supervise the provision of, specially designed instruction to meet the unique needs of children with disabilities;
 - b) Knows the general education curriculum; and
 - c) Knows about the availability of resources of the school district.
- (5) Someone who can interpret the instructional implications of the evaluation results, who may be one of the team noted previously;
- (6) At the discretion of the parents or the school district, other individuals who have knowledge or special expertise regarding the child, including related services personnel as appropriate; and
- (7) The child, whenever appropriate. The child must be invited if a purpose of the meeting is the consideration of postsecondary goals for the child and the transition services needed to assist the child in reaching those goals.

A member of the IEP team, other than the parent and the child if appropriate, is not required to attend an IEP team meeting, in whole or in part, if the parent and the district agree, in writing, that the attendance of that member is not necessary because the member's area of the curriculum or related services is not being modified or discussed at the meeting or portion of the meeting.

B. PARENTAL PARTICIPATION

The District takes steps to ensure that one or both of the parents of a child with a disability are present at each IEP team meeting or are afforded the opportunity to participate, including:

- (1) Notifying the parents of the meeting early enough to ensure that they will have an opportunity to attend; and
- (2) Scheduling the meeting at a mutually-agreed upon time and place.

A Notice to a Parent Regarding an IEP meeting:

- (1) Indicates the purpose, time and location of the meeting and who will be in attendance; and
- (2) Informs the parents of the provisions of the Operating Standards regarding the participation of other individuals who have knowledge or special expertise about the child and the participation of the Part C service coordinator or other representatives of the part C system at the initial IEP team meeting for a child previously served under Part C. See 3301-51-07(J)(2)(a)(ii) of the Operating Standards.

Beginning no later than the first IEP to be in effect when the child turns 14, the Notice also:

- (1) Indicates that a purpose of the meeting will be the development of a statement of the transition needs of the child; and
- (2) Indicates that the District will invite the child.

Beginning no later than the first IEP to be in effect when the child turns 16, the Notice also:

- (1) Indicates that a purpose of the meeting will be the consideration of the postsecondary goals and transition services for the child;
- (2) Indicates that the school district will invite the child; and
- (3) Identifies any other agency that will be invited to send a representative, if the parents consent.

The District conducts IEP team meetings without a parent in attendance only if it cannot convince parents that they should attend. Before an IEP team meeting is held without a parent, the District makes multiple attempts to contact a parent to arrange a mutually agreed on time and place, and records its attempts to do so.

C. CONTENTS OF AN IEP

The District uses ODE's required form, PR-O7, for its IEPs.

In developing each child's IEP, the IEP team considers:

- (1) The strengths of the child;

- (2) The concerns of the parents for enhancing the education of their child;
- (3) The results of the initial or most recent evaluation of the child;
- (4) The results of the child's performance on any state or district-wide assessment programs, as appropriate; and
- (5) The academic, developmental and functional needs of the child.

Further, the IEP team considers the following special factors:

- (1) In the case of a child whose behavior impedes the child's learning or that of others, the use of positive behavioral interventions and supports, and other strategies, to address that behavior;
- (2) In the case of a child with LEP, the language needs of the child as those needs relate to the child's IEP;
- (3) In the case of a child who is blind or visually impaired, the instruction of that child in accordance with the Operating Standards and section 3323.011 of the Revised Code;
- (4) The communication needs of the child, including those of a child who is deaf or hard of hearing; and
- (5) Whether the child needs assistive technology devices and services.

(1) CONTENTS OF EVERY IEP

The District's IEPs are written, and are developed, reviewed and revised in IEP meetings. The District's IEPs include all of the following:

- (a) A statement that discusses the child's future and documents planning information;
- (b) A statement of the child's present levels of academic and functional performance, including:
 - (1) How the child's disability affects the child's involvement and progress in the general education curriculum (i.e., the same curriculum as for nondisabled children); or
 - (2) For preschool children, as appropriate, how the disability affects the child's participation in appropriate activities;
- (c) A statement of measurable annual goals, including academic and functional goals and benchmarks or short-term objectives designed to:
 - (1) Meet the child's needs that result from the child's disability to enable the child to be involved in and make progress in the general education curriculum; and
 - (2) Meet each of the child's other educational needs that result from the child's disability;
- (d) A description of:
 - (1) How the child's progress toward meeting the annual goals described in the IEP will be measured; and
 - (2) When periodic reports on the progress the child is making toward meeting the annual goals will be provided;
- (e) A statement of the special education and related services and supplementary aids and services, based on peer-reviewed research to the extent practicable, to be provided to the child, or on behalf of the child, and a statement of the program modifications or supports for school personnel that will be provided to enable the child:
 - (1) To advance appropriately toward attaining the annual goals;

- (2) To be involved in and make progress in the general education curriculum in accordance with the Operating Standards, and to participate in extracurricular and other nonacademic activities; and
- (3) To be educated and participate with other children with disabilities and nondisabled children, as appropriate, in the activities described in 3301-51-07(H)(1)(e) of the Operating Standards;
- (f) An explanation of the extent, if any, to which the child will not participate with nondisabled children in the regular classroom and in activities;
- (g) A statement of any individual appropriate accommodations that are necessary to measure the academic achievement and functional performance of the child on state and districtwide assessments consistent with Section 612(a)(16) of the IDEA;
- (h) If the IEP team determines that the child must take an alternate assessment instead of a particular regular state or districtwide assessment of student achievement, a statement of why:
 - (1) The child cannot participate in the regular assessment; and
 - (2) The particular alternate assessment selected is appropriate for the child; and
- (i) The projected date for the beginning of the services and modifications described in the IEP and the anticipated frequency, location and duration of those services and modifications.

(2) TRANSITION SERVICES

The District’s IEPs address transition services as follows:

- (a) For children age 14 or over (or younger, if determined appropriate by the IEP team), the IEP includes a statement, updated annually, of the transition service needs of the child under the applicable components of the child's IEP that focuses on the child's courses of study (such as participation in advanced-placement courses or a vocational education program.); and
- (b) Beginning not later than the first IEP to be in effect when the child turns 16 (or younger if determined appropriate by the IEP team), the IEP includes:
 - (1) Appropriate measurable postsecondary goals based upon age-appropriate transition assessments related to training, education, employment and, where appropriate, independent living skills; and
 - (2) The transition services (including courses of study) needed to assist the child in reaching those goals.

(3) TRANSFER OF RIGHTS AT AGE OF MAJORITY

Beginning not later than one year before the child reaches 18 years of age, the IEP includes a statement that the child has been informed of the child's rights under Part B of the IDEA that will transfer to the child on reaching the age of majority.

(4) NONACADEMIC SERVICES, PHYSICAL EDUCATION, EXTENDED SCHOOL YEAR AND TRANSPORTATION

If appropriate, the IEP includes the services to be provided in each of these areas.

D. REVIEW AND AMENDMENT OF AN IEP

The District ensures that the IEP team:

- (1) Reviews the child's IEP periodically, but not less than annually, to determine whether the annual goals for the child are being achieved; and
- (2) Revises the IEP, as appropriate, to address:
 - (a) Any lack of expected progress toward the annual goals and in the general education curriculum;
 - (b) The results of any reevaluation;
 - (c) Information about the child provided to, or by, the parents as part of an evaluation or reevaluation;
 - (d) The child's anticipated needs; or
 - (e) Other matters; and
- (3) Reconvenes if an agency, other than the school district, fails to provide the transition services described in the IEP.

Changes to the IEP may be made either at an IEP team meeting, or by a written document amending or modifying the IEP, if the parent of the child and the District agree not to convene an IEP team meeting for the purposes of making those changes. If the IEP is amended by written document, without a meeting of the IEP team, the District ensures that the IEP team is informed of the changes made. When an IEP is amended, the District sends a copy of the amended IEP to the parent within thirty days of the date the IEP was amended.

VII. LEAST RESTRICTIVE ENVIRONMENT (LRE)

The District ensures that, to the maximum extent appropriate, children with disabilities, including children in public or nonpublic institutions or other care facilities, are educated with children who are nondisabled. Placement of students with disabilities in special classes, separate schooling or other removal from the regular educational environment occurs only if the nature or severity of the disability is such that education in regular classes with the use of supplementary aids and services, modifications and/or accommodations cannot be achieved satisfactorily.

The District ensures that a continuum of alternative placements is available to meet the needs of children with disabilities for special education and related services in the least restrictive environment (LRE).

The District determines the placement of a child with a disability at least annually, and the placement is based on the child's IEP, and is as close as possible to the child's home.

Unless the IEP of a child with a disability requires some other arrangement, the child is educated in the school that the child would attend if nondisabled.

In selecting the LRE for a child with a disability, the IEP team considers any potential harmful effect on the child or on the quality of the services that the child needs.

A child with a disability is not removed from education in age-appropriate regular classrooms solely because of needed modifications in the general education curriculum.

VIII. PARENTALLY PLACED NONPUBLIC SCHOOL CHILDREN

A. CHILD FIND

(1) GENERALLY

The District locates, identifies and evaluates all children with disabilities who are enrolled by their parents in chartered and nonchartered nonpublic schools, including religious elementary and secondary schools located within the District's geographical boundaries.

The District consults with the nonpublic school representatives and representatives of parents of parentally placed nonpublic school children with disabilities regarding the child find process, including:

- (a) How parentally placed nonpublic school children suspected of having a disability can participate equitably; and
- (b) How parent, teachers and nonpublic school officials will be informed of the child find process.

After timely and meaningful consultation with representatives of nonpublic schools, the District carries out child find activities for parentally placed nonpublic school children, including children whose parents live out-of-state. These activities are similar to the child find activities the District conducts for its public school children and ensures an accurate count of children with disabilities. The District completes these activities in a time period comparable to that for children attending its public schools, including completing any evaluations within 60 days of receiving parental consent. See Chapter V, Section A(1).

The District follows all IDEA and FERPA confidentiality requirements when serving children with disabilities attending nonpublic schools located within the District's boundaries and obtains parental consent before releasing any personally identifiable information about a child to officials of the child's district of residence or the nonpublic school in which the child is enrolled.

The District conducts, either directly or through contract, a full and individual initial evaluation of any parentally placed nonpublic school child suspected of having a disability who is enrolled in a nonpublic school within the District's boundaries. The District obtains written parental consent before conducting an initial evaluation.

- (a) If the parents of a parentally placed nonpublic school child do not provide consent or fail to respond to the District's request for consent to evaluate the child, the District may not use mediation or due process procedures to pursue the evaluation. The District does not have to consider this child as eligible for services.
- (b) If the parents do not make clear their intent to keep their child enrolled in the nonpublic school, the District provides the parents of a child who is determined to be eligible for special education services written documentation stating that the child's school district of residence is responsible for making FAPE available to the child.

- (c) The District sends a copy of this documentation to the child's district of residence, provided the District obtains written parental consent to release the information.

The District conducts reevaluations of parentally placed nonpublic school children with disabilities receiving special education and any related services to determine continued eligibility for services. The District conducts reevaluations no more than once a year, unless the parents and the District agree otherwise, and at least once every three years, unless the parents and the district agree that a reevaluation is unnecessary.

(2) AUTISM SCHOLARSHIP PROGRAM PARTICIPANTS

The District assumes responsibility for the initial evaluations and re-evaluations of children who reside in the District and desire to participate in the Autism Scholarship Program. The district where the nonpublic school is located conducts all reevaluations for children with disabilities participating in the Autism Scholarship Program. (See 3301-51-08(R)(1) of the Operating Standards). The District creates the IEP that is required for eligible children who reside within the District to participate in the Autism Scholarship Program.

B. CONSULTATION

The District consults with nonpublic school representatives and representatives of parents who have placed their children with disabilities in nonpublic schools in a timely and meaningful way during the design and development of special education and related services for the children regarding the following:

(1) CHILD FIND

See above requirements.

(2) PROPORTIONATE SHARE OF FUNDS

- (a) The determination of the proportionate share of federal IDEA Part B funds available to serve parentally-placed nonpublic school children with disabilities;
- (b) The determination of how the proportionate share of those funds was calculated; and
- (c) Consideration of the number of children and their needs and location.

“Proportionate share” refers to the amount of federal IDEA Part B funds the District must expend to provide the group of parentally-placed nonpublic school children with disabilities with equitable participation in services funded with federal IDEA Part B funds. The District follows the formula in 3301-51-05(E)(1)–(4) of the Operating Standards to calculate the proportionate amount.

(3) CONSULTATION PROCESS

- (a) How the consultation process will bring together District representatives, nonpublic school officials and representatives of parentally placed nonpublic school children with disabilities;

- (b) How the process will take place throughout the school year to ensure that parentally-placed nonpublic school children with disabilities identified through the child find can meaningfully participate in special education and related services.

(4) PROVISION OF SPECIAL EDUCATION AND RELATED SERVICES

- (a) How, where and by whom special education and related services will be provided;
- (b) The types of services, including direct services and alternate service delivery mechanisms;
- (c) How special education and related services will be apportioned if funds are insufficient to serve all parentally placed nonpublic school children; and
- (d) How and when these decisions will be made.

(5) WRITTEN EXPLANATION BY THE SCHOOL DISTRICT

How the District will provide the nonpublic school officials a written explanation of the reasons why the District chose not to provide services directly or through a contract if the District disagrees with the views of the nonpublic school officials on the provision of services or the types of services.

The District obtains a written affirmation signed by representatives of the participating nonpublic schools that timely and meaningful consultation has occurred. If representatives of the participating nonpublic schools do not provide the affirmation within a reasonable period of time or choose not to participate under the proportionate share provisions of IDEA and engage in consultation, the District documents its consultation attempts and forwards the documentation to the ODE-OEC. If a nonpublic school located within the boundaries of the District chooses not to participate, the parents may contact the District to request services for the child.

C. RIGHTS TO SERVICES

The District is not required to pay for the cost of education, including special education and related services, of a child with a disability, enrolled at a nonpublic school or facility if:

- (1) The child's district of residence made FAPE available to the child; and
- (2) The parents elected to place the child in the nonpublic school.

The District includes these children and their needs in the population being considered when making decisions about services to be provided to parentally placed nonpublic school children with disabilities.

If the parents make clear their intention to keep their child with a disability enrolled in the nonpublic school, the child's district of residence does not need to develop an IEP for the child. If the child with a disability re-enrolls in the District, the District makes FAPE available.

D. EQUITABLE SERVICES DETERMINED

The District makes the final decisions about the services to be provided through a services plan to eligible parentally placed nonpublic school children with disabilities who are attending

nonpublic schools within the District's geographic boundaries. The District makes these decisions after consultation with nonpublic school representatives and parents of parentally placed nonpublic school children and through meetings to develop, review and revise services plans. A child with a disability attending a nonpublic school does not have an individual right to receive some or all of the special education and related services that the child would receive if enrolled in a public school.

E. EQUITABLE SERVICES PROVIDED

(1) THE SERVICES PLAN

- (a) The District, whether or not it is the child's school district of residence, convenes the services plan meeting, conference call, or video conference for each eligible child who will receive special education and any related services for children who attend nonpublic schools located within the District's geographical boundaries.
- (b) The District determines required participants at the services meeting.
- (c) The District ensures that a nonpublic school representative participates in the development or revision of the services plan.
- (d) The District conducts a meeting, conference call, or video conference at least annually to review and revise, if appropriate, each child's services plan.
- (e) The District uses the ODE required Services Plan PR-09 form for individually developing a services plan for each participating child that describes the specific special education and related services that the District will provide to the child. Parentally placed nonpublic school children with disabilities may receive a different amount of services than children with disabilities enrolled in the District.

(2) PROVISION AND LOCATION OF SERVICES

- (a) District personnel provide services to parentally placed nonpublic school children who attend nonpublic schools located within the District's geographical boundaries or the District provides services through a contract with an individual, association, agency, organization or other entity.
- (b) The District ensures that special education and related services, including materials and equipment, provided to parentally placed nonpublic school children with disabilities are secular, neutral and non-ideological.
- (c) The District, in consultation with the nonpublic school, will determine where services will be provided. Services may be provided on or off the premises of the nonpublic school. The District may provide services at the nonpublic school with the permission of that school.

(3) TRANSPORTATION

- (a) The District provides transportation to parentally placed nonpublic school children with disabilities who attend nonpublic schools located within the District's geographical boundaries if the services being provided under IDEA are being delivered at a location other than the nonpublic school the child is attending. The District provides transportation:
 - (1) From the child's nonpublic school or the child's home to the site other than the nonpublic school; and

- (2) From the service site to the nonpublic school or to the child' home depending on the timing of the services;
- (b) The District may include the cost of transportation to special education and related services that are being delivered at a location other than the nonpublic school in calculating whether it has met the requirements of spending a proportionate amount of federal funds that it receives to serve children with disabilities; and
- (c) The District provides transportation to all children, with and without disabilities, who reside within the District and who are parentally placed in chartered nonpublic schools following the requirements in ORC 3327.01.

F. DUE PROCESS COMPLAINTS AND COMPLAINTS TO ODE

Due process rights do not apply to the provision of special education and related services the District has agreed to provide through a services plan. However, the parents of a child with a suspected disability, or a child identified as having a disability, who is enrolled in a nonpublic school, have the right to file a due process complaint against the District where the nonpublic school is located regarding that District's failure to meet the child find requirements, including location, identification, evaluation and reevaluation of the child.

If the District receives a due process complaint requesting a due process hearing from the parents of parentally placed nonpublic school child, the District follows the procedures that apply to other due process complaints.

The parents of a child with a disability, who has been unilaterally placed in a nonpublic school, have the right to file a formal written complaint with ODE-OEC regarding a number of different issues, which are listed in 3301-51-08(L)(3) of the Operating Standards.

APPENDIX A

**When to Provide
Prior Written Notice, Informed Consent and Procedural Safeguards Notice (*Whose IDEA Is This?*)**

Steps in the Special Education Process	Action Required		
	Notification or Informed Consent	Prior Written Notice to Parents PR-01	Whose IDEA Is This?
1. Procedural safeguards must be provided to the parents once a year			X
2. Procedural safeguards must be provided upon request of the parents			X
3. Initial referral for a suspected disability		X	X
4. Initial evaluation	Informed consent (Parent Consent for Evaluation PR-04 form)	X	
5. Eligibility determination		X	
6. IEP meeting	Notification (Parent Invitation to Meeting PR-02 form)	Provide after an IEP, if parents do not agree or do not attend the meeting	
7. Reevaluation with assessments conducted	Informed consent (Parent Consent for Evaluation PR-04 form)	Provide before, and after if parents do not agree or disability category changes	
8. Reevaluation without further assessments conducted	Notification	May use this form to notify before, and provide after, if parents do not agree or disability category changes	
9. No reevaluation conducted		X	
10. Transfers from out of state and out of district	Informed consent (Parent Consent for Evaluation PR-04 form) (If an evaluation is to be conducted)	Provide only after an IEP, if parents do not agree	If moved from out of state
11. Change of placement	Informed consent (IEP PR-07 form)	Provide only after an IEP, if parents do not agree	
12. Change in the type and amount of services		Provide only after an IEP, if parents do not agree	
13. Exit from special education	Notification (Summary of performance if graduating or aging out of special education)	X	
14. District refuses services requested by parents		X	
15. District proposes/refuses to change disability category		X	
16. Releasing personally identifiable information	Informed consent (written consent)		
17. Destruction of personally identifiable information	Notification prior to destruction		
18. Transfer of parental rights	Statement included in IEP PR-07 form		X
19. Upon receipt of the first due process complaint or upon receipt of first state complaint in school year			X
20. Disciplinary change in placement		X	X
21. Revocation of consent		X	

Prior Written Notice, Informed Consent and Procedural Safeguards Notice (*Whose IDEA Is This?*)

1. Procedural safeguards must be provided to the parents once a year.

The school district must give a copy of the **procedural safeguards notice (*Whose IDEA Is This?*)** to the parents at least once a year, except as noted below:

- Upon initial referral or the parents request for evaluation;
- Upon request by the parents;
- Upon receipt of the first due process complaint or state complaint in a school year; and
- Upon a change in placement for disciplinary action.

2. Procedural safeguards must be provided upon request of the parents.

The school district must give a copy of the **procedural safeguards notice (*Whose IDEA Is This?*)** to the parents whenever the parents request.

3. Initial referral for a suspected disability

On the date of the referral, the district must provide the parents with a copy of the **procedural safeguards notice (*Whose IDEA Is This?*)**. For a parental referral, the date of referral is the date that the district received either the verbal or written request from the parents to conduct an evaluation. For a district referral, the date of referral is the date that the screening or review team decided an evaluation should be conducted. See Evaluation – 6.2 Request and Referral for Initial Evaluation. Within 30 days of the date of initial referral by the parents for a suspected disability, the district must provide the **Prior Written Notice to Parents PR-01** form to the parents if the district does not suspect a disability.

4. Initial evaluation

Within 30 days of the date of initial referral by the parents for a suspected disability, the district must provide the **Prior Written Notice PR-01** form to the parents and receive written, **informed consent (Parent Consent for Evaluation PR-04 form)** from the parents prior to conducting any assessments as part of an initial evaluation. A description of any evaluation procedures the district proposes to conduct must also be provided to the parents. (If the notice relates to an action proposed by the district that also requires parental consent, the district may give notice at the same time it requires parental consent.)

5. Eligibility determination

If the evaluation team determines that a child is not eligible for special education and related services the district will provide the parents the **Prior Written Notice to Parents PR-01** form once this determination is made. If the evaluation team determines that a child is eligible for special education and related services, see Item number 6, IEP Meeting.

6. IEP Meeting

The district must use the required **Parent Invitation PR-02** form to notify and invite the parents to an IEP meeting. Districts must take steps to ensure that one or both parents are present at each IEP meeting or are afforded the opportunity to participate. This requires that the district:

- Notify the parents of the IEP meeting early enough to ensure that they have an opportunity to attend; and
- Schedule the meeting at a mutually agreed upon time and place.

A district must provide the **Prior Written Notice to Parents PR-01** form after an IEP meeting, if the parents do not agree with the IEP or any portion of the IEP or do not attend the meeting.

A district must provide **prior written notice** to the parents and receive **written, informed consent** from the parents before the initial placement of a child in special education. The **IEP PR-07** form serves as prior written notice unless the parents disagree with the IEP. Written informed consent to initiate special education and related services is provided through the parents' signature on the IEP form.

7. **Reevaluation with assessments conducted**

A district must provide the **Prior Written Notice to Parents PR-01** form and obtain **informed parental consent (Parent Consent for Evaluation PR-05 form)** before conducting any tests or assessments as part of a reevaluation of a child with disabilities, unless the district has provided notice and the parents have failed to respond to reasonable attempts to obtain consent.

The district must provide the **Prior Written Notice to Parents PR-01** form after the reevaluation is completed, if the parents disagree with the reevaluation or the reevaluation results in a change in the child's disability category.

8. **Reevaluation without further assessments conducted**

If the evaluation team determines that no additional data are needed to determine that the child continues to be a child with a disability and to determine the child's educational needs, the evaluation team must notify the child's parents. The notification that no further assessments are necessary must include:

- The team's determination and the reasons for the determination; and
- The parents' right to request an assessment to determine whether the child continues to be a child with a disability and to determine the child's educational needs.

The **Prior Written Notice to Parents PR-01** form may be used for this notification as long as it includes the information listed directly above.

The district must provide the **Prior Written Notice to Parents PR-01** form after the reevaluation is completed, if the parents disagree with the reevaluation or the reevaluation results in a change in the child's disability category.

9. **No reevaluation conducted**

If the IEP team, including the parents, agrees that a reevaluation of a child is unnecessary, the district must provide the **Prior Written Notice to Parents PR-01** form.

10. **Transfers from out of state and out of district**

Upon the enrollment of a child with an existing IEP from another district or state, the district must convene the IEP team and determine if the team will accept the existing IEP or change the existing IEP. If the parents disagree with the IEP team on the IEP that will be implemented by the district, the **Prior Written Notice to Parents PR-01** form must be provided to the parents. See [IEP – 7.1 General](#).

Transfers from out of state

If the child moved into the district from another state, the district must provide the parents with a copy of the **procedural safeguards notice (Whose IDEA Is This?)**.

If the district determines that a new evaluation is necessary for a child who transfers from out of state, the evaluation is considered an initial evaluation and the district must provide the **Prior Written Notice to Parents PR-01** form and obtain written parental consent (**Parent Consent for Evaluation PR-05 form**). See [Evaluation – 6.2 Request and Referral for Initial Evaluation](#).

Transfers from out of district

If the child transfers into the district from another district in the state, the district provides the parents with a copy of the **procedural safeguards notice (*Whose IDEA Is This?*)** if the sending school district had not provided the parents with a copy during the current school year.

If the IEP team refers a child who transfers from another district in the state for additional evaluation, the evaluation is considered to be a reevaluation. The district must provide the **Prior Written Notice to the Parents PR-01** form and obtain written parental consent (**Parent Consent for Evaluation PR-05** form). See [Evaluation – 6.5 Reevaluation](#).

11. Change of placement

The district must provide the **Prior Written Notice to Parents PR-01** form after an IEP meeting, if the parents do not agree with the IEP team's proposed change of placement on the continuum of alternative placement options. The district may not change the child's placement until the parents consent to the proposed change of placement.

12. Change in the type and amount of services

The district must provide the **Prior Written Notice to Parents PR-01** form after an IEP meeting, if the parents do not agree with the changes in the types and amount of services being proposed. The district may then proceed to implement the IEP.

13. Exit from special education

The district must provide the **Prior Written Notice to Parents PR-01** form whenever a child exits special education. In addition, for a child whose eligibility for special education terminates because the child is graduating with a regular diploma or exceeding the age eligibility for special education, the school district must provide the child with a **summary of the child's academic achievement and functional performance**, which shall include recommendations on how to assist the child in meeting the child's postsecondary goals.

14. District refuses services requested by parents

The district must provide the **Prior Written Notice to Parents PR-01** form to the parents any time the district refuses the request of the parents to provide special education and related services to the child.

15. District proposes/refuses to change disability category

The district must provide the **Prior Written Notice to Parents PR-01** form to the parents any time the district proposes or refuses to change the child's disability category. The ETR and the documentation of eligibility can be considered a prior written notice if all the elements required in a prior written notice are present in the ETR and determination of eligibility.

16. Releasing personally identifiable information

The district must obtain **written parental consent** prior to releasing any personally identifiable information about the child to any person or agency not entitled by law to see it, and to a representative of any participating agency that is likely to be responsible for providing or paying for transition services.

17. Destruction of personally identifiable information

The school district must inform the parents when personally identifiable information collected, maintained and used is no longer needed to provide educational services to the child. The information must be destroyed at the request of the parents. However, a permanent record of a child's name, address, telephone number, grades, attendance record, classes attended, grade level completed and year completed shall be maintained without time limitation. This **notification may be in writing or provided verbally**. If provided verbally, the school district should document this notification in the child's education record.

18. Transfer of parental rights

One year before the child's 18th birthday, the district must notify both the child and the parents of the parental rights, under Part B, that will transfer to the child upon reaching the age of majority. The district also must provide the child with a copy of the **procedural safeguards notice (Whose IDEA Is This?)**. This notification is documented on the child's **IEP PR-07** form.

19. Upon receipt of the first due process complaint or upon receipt of the first state complaint in the school year

The school district must give the parents a copy of the **procedural safeguards notice (Whose IDEA Is This?)** upon receipt of the parents' first due process request. The Ohio Department of Education, Office for Exceptional Children gives the parents a copy of the **procedural safeguards (Whose IDEA Is This?)** upon the parents' filing of the first state complaint within the school year.

20. Disciplinary change in placement

Whenever a change of placement occurs due to disciplinary action, a copy of the **procedural safeguards notice (Whose IDEA Is This?)** and **Prior Written Notice PR-01** form must be provided.

21. Revocation of consent (must be in writing)

The district must provide the **Prior Written Notice to Parents PR-01** form if the parents of a child with a disability revoke consent in writing for the continued provision of all special education and related services. This notice must include:

- A summary of all of the supports and services the child will no longer receive, and any change in educational placement that will occur as a result of the revocation of consent.
- Statements that once the revocation takes effect, the district will not be considered to be in violation of its requirement to make FAPE available, is not required to convene an IEP meeting or develop an IEP, is not required to conduct a three year reevaluation, is not required to offer the child the discipline protections available under IDEA and is not required to amend the child's education records to remove any reference to the child's receipt of special education and related services.
- A statement that by revoking consent for special education and related services for the child, the parent is not waiving the right to request an initial evaluation or to receive services in the future.

Coversheet

TIS-Reading Achievement Plan

Section: I. Opening Items
Item: K. TIS-Reading Achievement Plan
Purpose: Vote
Submitted by:
Related Material: Reading Achievement Plan 2024.pdf

READING ACHIEVEMENT PLAN

[Ohio law](#) requires each school district or community school that meets the following criteria, as reported on the past two consecutive report cards issued for that district or community school, to submit to the Ohio Department of Education and Workforce a Reading Achievement Plan by Dec. 31.

1. The district or community school received a performance rating of less than three stars on the Early Literacy measure.
2. 51 percent or less of the district's or community school's students scored proficient or higher on Ohio's State Test for grade 3 English language arts.

The recommended length for Reading Achievement Plans encompassing grades Kindergarten through grade 3 should be 25 pages. Comprehensive Pre-K through grade 12 Reading Achievement Plans are expected to be longer than 25 pages. Section headings in the template marked with an asterisk are required by state law.

DISTRICT NAME: The Intergenerational School

DISTRICT IRN: 133215

DISTRICT ADDRESS: 11327 Shaker Blvd., Cleveland, Ohio 44104

PLAN COMPLETION DATE: Friday, December 8, 2023

LEAD WRITERS: Mario Clopton-Zymler, Ed.D.

OHIO'S LANGUAGE AND LITERACY VISION

Ohio Governor Mike DeWine recently announced the [ReadOhio initiative](#), an exciting statewide effort to encourage improved literacy skills for all ages that includes the implementation of curriculum aligned with the science of reading in Ohio's schools. The Governor also [released a video](#) to explain what the science of reading is and why it is important.

In addition, the Ohio Department of Education and Workforce developed the [ReadOhio toolkit](#) to guide school leaders, teachers and families in this important work. The toolkit is filled with resources including the [Shifting to the Science of Reading: A Discussion Guide for School and District Teams](#), professional learning tools and practices for schools as they prepare for the start of the new academic year.

As described in [Ohio's Plan to Raise Literacy Achievement](#), Ohio's vision is for all learners to acquire the knowledge and skills to become proficient readers. The Ohio Department of Education and Workforce and its partners view language and literacy acquisition and achievement as foundational knowledge that supports student success. To increase learner's language and literacy achievement, the Department is urging districts and schools to use evidence-based systems and high-quality instruction, select high-quality instructional materials and employ culturally responsive practices.

CULTURALLY RESPONSIVE PRACTICE*

“Culturally Responsive Practice” means an approach that recognizes and encompasses students’ and educators’ lived experiences, cultures and linguistic capital to inform, support and ensure high-quality instruction. In a Culturally Responsive environment, educators have high expectations of all students, demonstrate positive attitudes toward student achievement, involve students in multiple phases of academic programming, and support the unique abilities and learning needs of each student.

The Department encourages districts and schools to consider Culturally Responsive Practices as Reading Achievement Plans are developed.

Please see the Department's [Culturally Responsive Practice program page](#).

SECTION 1: DISTRICT LEADERSHIP TEAM MEMBERSHIP, STAKEHOLDERS, DEVELOPMENT PROCESS AND PLAN FOR MONITORING IMPLEMENTATION*

SECTION 1, PART A: LEADERSHIP TEAM MEMBERSHIP AND STAKEHOLDERS*

Insert a list of all leadership team members, stakeholders, roles and contact information. The Department encourages districts and community schools include team members from the early childhood providers that feed into the district or school.

Name	Title/Role	Location	Email
Mario Clopton-Zymler	Principal	The Intergenerational School	mcloptonzymler@tisonline.org
Sydney Brewster	Title I Teacher	The Intergenerational School	sbrewster@tisonline.org
Matt Hejl	Title I Teacher	The Intergenerational School	mhejl@tisonline.org
Lisa Vahey	Lead Coach	The Intergenerational School	lvahey@tisonline.org
		The Intergenerational School	
		The Intergenerational School	
		The Intergenerational School	

SECTION 1, PART B: DEVELOPING, MONITORING AND COMMUNICATING THE READING ACHIEVEMENT PLAN

Describe how the district leadership team developed the plan and how the team will monitor and communicate the plan.

UNIVERSAL SCREENING AND TIERED INSTRUCTION

This process is for all students who are not currently on an IEP or 504 Learning Plan. The RTI process begins with a Universal Screener. The Intergenerational School uses NWEA MAP Growth Assessments as the Universal Screener.

**Section headings marked with an asterisk are required by state law.*

- A. Each student will take the Reading and Math MAP Growth Assessments
 - 1. Intervention Specialists will assure the appropriate student accommodations are made available to students who receive special education services
- B. Each TBT Team will analyze MAP results and place students in groups: meet with the Specialists to review Growth Reports in three groups:
 - . Tier 1 Yellow (On Grade Level): Students who are at or above their grade Level RIT score up to 9 points will receive Tier 1 instruction.
 - 1. Tier 1.9 Yellow (Below Grade Level): Students who are 1-10 points below Grade Level RIT score will receive KPI Intervention (Yellow Tier 2) 2x per week for no more than 30 minutes per session from teacher. If Comprehension is the lowest Instructional Focus then the student gets 1x of GR with Specialists
 - 2. Tier 2 Orange/Tier 3 (Very Below Grade Level) Students who are 11-19 points or more below Grade Level RIT score and will receive KPI Intervention Orange 3x per week no more than 30 minutes (Red) 4x per week for no more than 30 minutes per session
 - 3. Enrichment: Green and Blue (Above Grade Level): Students who are more than 10 points above their grade level RIT score will or at Green on MAP Growth report will receive KPI Enrichment 2x per week

DATA ANALYSIS AND APPLICATION TO INTERVENTION/ENRICHMENT

The Next Step in the process is to take the data from the universal screener, identify the deficit areas within the instructional areas for Reading or Math and identify the state standards that align with those deficit instructional areas. Then, assign interventions/enrichments in IXL that align with the instructional areas identified in the universal screener.

Teacher identifies the lowest deficit instructional area for Reading or Math

Teacher identifies 1 or 2 standards from the deficit instructional area for reading.

- 1. Generally you are viewing learning statements to Develop (this is defaulted)
- 2. Keep in mind that MAP gives you the deficit standards that match the grade level standard of the deficit. This may be standards that are at or below a students current rostered grade level. For example: the student below has a deficit standard OH.ELA-Literacy.RF.1.3a. OH = Ohio, ELA-Literacy = English Language Arts. RF = Reading Foundational Skills, 1 = Grade 1.3a Standard 3a

Teacher assigns skill in IXL program that aligns to the standards identified in Growth Report.

- 3. Go to IXL Learning Tab

4. Select Ohio State Standards

1. Select the appropriate Grade Level and Subject Area (this may or may not be the student's rostered grade level)
2. Assign the skills associated with that standard to the student (This [video](#) shows you how to assign an IXL skill, its the same process for assigning a state standard)
 1. Teacher or Specialist will work through the skills 2x a week for no more than 30 minutes in class.
 1. Teacher or Specialist works with the student 1:1 or in small group
 2. Teacher or Specialist provides incentives to the student for doing the work well

PROGRESS MONITORING

After interventions and enrichments have been completed there must be a moment to progress monitor where the student is on the path to achieving mastery in the deficit instructional area.

5. After 4 sessions, Teacher or Specialist reports IXL Smart Score on [KPI Tracker](#). Mastery is 80% or higher. If a student reaches 80% on a skill, the Teacher or Specialist will assign the next skills the student needs to master based on the MAP identified deficit standard.

Special Education

Students with Special Education Plans (IEPs or 504s with Learning Goals) will receive Tier 2 and 3 services through the Special Education Staff. Teachers are always responsible for all student Tier 1 instruction, including students who receive Special Services.

SECTION 2: ALIGNMENT BETWEEN THE READING ACHIEVEMENT PLAN AND OVERALL IMPROVEMENT AND EQUITY EFFORTS*

Describe how the Reading Achievement Plan is aligned to and supports the overall continuous improvement and equity efforts of the district or community school. Districts and community schools established under Chapter 3314. of the Revised Code that are required to develop or modify a local equitable access plan, an improvement plan or implement improvement strategies as required by section 3302.04, 3302.10, 3301.0715(G) or another section of the Revised Code shall ensure the plan required by this section aligns with other improvement and equity efforts.

The Reading Achievement Plan is aligned to our model strategic plan and school improvement plan.

Goal1: Every student will experience a high-quality developmental multi-age education in a social and emotionally safe environment centered on intergenerational learning opportunities.

SECTION 3: WHY A READING ACHIEVEMENT PLAN IS NEEDED IN OUR DISTRICT OR COMMUNITY SCHOOL*

SECTION 4 PART A: RELEVANT LEARNER PERFORMANCE DATA*

Insert **disaggregated** student performance data from sources that **must include**, but are not limited to:

- **The Kindergarten Readiness Assessment,**

2 students (12.5%) Demonstrating Readiness

5 students (31.3%) Approaching Readiness

9 students (56.3%) Emerging Readiness

- **Ohio’s State Test for English language arts assessment for grades 3-8,**

3rd Grade Fall ELA OST:

- 14 students- 50% Limited,
- 8 students- 29% Basic,
- 4 students- **14% Proficient,**
- **2 students- 7% Advanced**

ELA OST Spring 2022-2023

Assessment Name	Test Group	Test Grade	Test Reason	Student Count	Average Score	Performance Distribution	Date Last Taken
Grade 7 English Language Arts	Ohio's State Tests	7	Spring 2023 (OST)	21	668	 Percent Count: 82% 11, 43% 5, 6% 1	04/25/2023
Grade 8 English Language Arts	Ohio's State Tests	8	Spring 2023 (OST)	15	702	 Percent Count: 20% 3, 40% 6, 20% 3, 13% 2, 7% 1	04/21/2023
Grade 6 English Language Arts	Ohio's State Tests	6	Spring 2023 (OST)	22	703	 Percent Count: 18% 4, 32% 7, 14% 3, 32% 7, 6% 1	04/13/2023
Grade 4 English Language Arts	Ohio's State Tests	4	Spring 2023 (OST)	21	692	 Percent Count: 33% 7, 38% 8, 6% 1, 14% 3, 10% 2	04/12/2023
Grade 3 English Language Arts	Ohio's State Tests	3	Spring 2023 (OST)	23	682	 Percent Count: 39% 9, 26% 6, 22% 5, 13% 3	04/12/2023
Grade 5 English Language Arts	Ohio's State Tests	5	Spring 2023 (OST)	20	702	 Percent Count: 18% 2, 35% 7, 35% 7, 10% 2, 18% 2	04/12/2023
Grade 3 English Language Arts	Ohio's State Tests	3	Fall 2022 (OST)	23	663	 Percent Count: 61% 14, 30% 7, 9% 2	10/19/2022

*Section headings marked with an asterisk are required by state law.

- **K-3 Reading diagnostics (include subscores by grade level),**

See attached.

- **The Ohio English Language Proficiency Assessment (OELPA)**

Not applicable

- **The Alternate Assessment for Students with Significant Cognitive Disabilities and**

Not applicable

SECTION 3 PART B: INTERNAL AND EXTERNAL FACTORS CONTRIBUTING TO UNDERACHIEVEMENT IN READING*

Insert internal and external factors believed to contribute to low reading achievement in the school district or community school.

Teaching Methods

- Ineffective instructional strategies or teaching methods may hinder students' reading progress.
- Lack of differentiation to meet the diverse learning needs of students.

Teacher Quality

- High teacher turnover has affected the quality of instruction.
- Some teachers are not credentialed with professional licenses and some lack experience to affect student outcomes.
- Insufficient training in literacy instruction strategies.

Student Engagement

- Lack of interest or motivation among students.
- Insufficient use of interactive and engaging reading materials.

Socioeconomic Status

- TIS is a Title School and many students face challenges such as limited access to books at home and fewer educational opportunities outside of school.

Health and Well-being

- Factors such as poor nutrition, health issues, or inadequate access to healthcare can affect a student's ability to focus and engage in learning, including reading.

SECTION 4: MEASURABLE LEARNER PERFORMANCE GOALS AND ADULT IMPLEMENTATION GOALS*

Describe the measurable learner performance goals addressing learners' needs (Section 5) based on student performance goals by grade band (K-3) that the Reading Achievement Plan is designed to support progress toward. Also describe the measurable adult implementation goals based on the internal and external factor analysis by grade band (Kindergarten through grade 3). The plan may have an overarching goal, as well as subgoals such as grade-level goals). Goals should be strategic/specific, measurable, ambitious, realistic and time-bound. In addition, goals should be inclusive and equitable.

Overarching Goal Addressing Learners' Needs: By the end of the academic year at least 50% of students will meet their NWEA MAP Reading diagnostic goal

Overarching Goal Addressing Adult Implementation: By the end of the school year, at least 80% of the adults will be rating Skilled on the OTES rubric for the categories of High-Quality Student Data, Use of Assessments, and Monitoring Student Progress

THE INTERGENERATIONAL SCHOOL has hired a reading specialist and education aides who will serve alongside our teachers in implementing interventions for students who are not meeting proficiency on OST and who are not meeting growth goals as identified on MAP assessment scores. The Reading specialists will focus on students who have Reading Improvement Monitoring Plans (RIMP)

THE INTERGENERATIONAL SCHOOL will analyze MAP assessment data and will train teachers on the use of the Learning Continuum and Quadrant Chart Student Growth Reports to inform decisions on instructional goals. We will also do teacher based team level analysis of Ohio State Test data to inform teaching and instruction for the remainder of the school year.

Based on MAP instructional areas students will receive additional intervention or enrichment in the suggested area of focus recommended by NWEA or in an area recommended by the teacher.

SECTION 5: ACTION PLAN MAP(S) FOR ACTION STEPS*

Each action plan map describes how implementation of the Reading Achievement Plan will take place for each specific literacy goal the plan is designed to address. For goals specific for grades K-3, at least one action step in each map should address supports for students who have Reading Improvement and Monitoring Plans. Include a description of the professional development activities provided for each goal.

Goal # ___ Action Map

Goal Statement: Overarching Goal Addressing Learners’ Needs: By the end of the academic year at least 50% of students will meet their NWEA MAP Reading diagnostic goal

Evidence-Based Strategy or Strategies:THE INTERGENERATIONAL SCHOOL uses a workshop approach, which allows students to learn what they need to learn at a pace and with materials that match their needs. However, guided reading is the part of the reading workshop where a teacher individualizes their instruction to meet the needs of students. Guided Reading groups pull together students with similar needs and provide them with quick, targeted instruction that, along with extended time to practice independently and time to enjoy books with others, teaches them to read.

Fountas and Pinnell Classroom Guided Reading gives teachers both books and lessons to use with students. The research-based set of materials connect to the reading assessment already consistently used at THE INTERGENERATIONAL SCHOOL as part of our Benchmark assessments. Specifically, the lessons, taught in quick 12-minute sessions allow for plenty of independent practice and the opportunity for teachers to see more students on a regular basis and meet the individual needs of readers.

	Action Step 1	Action Step 2	Action Step 3
Implementation Component	Implement Tier I instructional curriculum with fidelity and consistency.	Implement coaching cycles for all Teachers	Utilize Winter MAP scores to recalibrate RTI process
Timeline	October 2023-May 2024	November-January 2024	February 2023- April 2024
Lead Person(s)	Principal	Coaching Team	Title Teachers
Resources Needed	Units of Study Curriculum Chart Paper NWEA MAP Data	Units of Study Curriculum Chart Paper NWEA MAP Data	RTI Data Tracker NWEA MAP Data

**Section headings marked with an asterisk are required by state law.*

	Action Step 1	Action Step 2	Action Step 3
Specifics of Implementation (Professional development, training, coaching, system structures, implementation support and leadership structures)	PD Sessions on analyzing MAP Data Coaching Cycles TBT Meetings with Cluster Director leading student growth discussions	Coaching Cycles to be determined by the Lead Coach based on need and available resources	PD Sessions on analyzing MAP Data Coaching Cycles TBT Meetings with Cluster Director leading student growth discussions
Measure of Success	OTES Observations and Walkthroughs	Coaching Observational Notes	RTI Tracker
Description of Funding	General Funds	General Funds	General Funds
Check-in/Review Date	January 2024- Week 2 March 2024- Week 2 May 2024 Week 2	Bi-Weekly	Bi-weekly

SECTION 6: PROCESS FOR MONITORING PROGRESS AND IMPLEMENTATION OF THE PLAN'S STRATEGIES.*

Describe the process for monitoring the progress and implementation of the plan's strategies.

Monitoring the progress and implementation of the plan's strategies involves a comprehensive and collaborative approach. The key components include teacher-based team meetings, teacher evaluations led by the Principal, bi-weekly check-ins with the Title Teacher Team, and the use of the RTI tracker accessible through Google Classroom.

Teacher-Based Team Meetings

Regular team meetings are scheduled weekly to discuss the progress and implementation of the strategies outlined in the plan. Teachers collaborate to share insights, successes, and challenges faced in the classroom. These meetings serve as a platform for brainstorming solutions and refining strategies to better meet the needs of students.

Principal-led Teacher Evaluations

The Principal plays a crucial role in holding everyone accountable for the plan's success. During teacher evaluations, the Principal assesses individual teachers based on their contribution to the plan's implementation. This includes evaluating the effectiveness of instructional strategies, assessment, and monitoring student progress.

Bi-weekly Check-ins with the Title Teacher Team

The Title Teacher Team, with its specialized focus, conducts bi-weekly check-ins with the Principal to assess the effectiveness of strategies related to Title programs. These sessions provide an opportunity for the team to share insights, discuss student performance, and make adjustments to interventions based on real-time data and observations.

RTI Tracker in Google Classroom

An RTI tracker accessible through Google Drive serves as a centralized platform for data collection and analysis. Teachers, administrators, and relevant support staff have access to this tracker. Regular updates to the tracker ensure that all stakeholders are informed about the progress of individual students and the overall success of the plan.

Data Analysis and Reflection

The data collected through the RTI tracker is analyzed collaboratively during team meetings and check-ins. This analysis informs decision-making, allowing adjustments to be made to the plan's strategies as needed. Regular reflection on the data ensures a dynamic and responsive approach to addressing the diverse needs of students.

Communication Channels

Open lines of communication are established among all stakeholders. Teachers communicate with the Title Teacher Team, Principal, and other relevant parties to share updates, seek guidance, and provide insights into the plan's implementation. This collaborative communication ensures that everyone remains informed and engaged in the process.

Professional Development Opportunities

As the plan progresses, professional development opportunities may be identified based on the insights gained from monitoring. These opportunities can be tailored to address specific challenges or enhance the implementation of effective strategies.

By integrating these monitoring processes, the educational community ensures a holistic and dynamic approach to the plan's success. Continuous collaboration, data-driven decision-making, and regular communication contribute to a supportive environment where everyone is actively engaged in the pursuit of improved student outcomes.

SECTION 7: EXPECTATIONS AND SUPPORTS FOR LEARNERS AND SCHOOLS*

SECTION 7 PART A: STRATEGIES TO SUPPORT LEARNERS*

Describe the evidence-based strategies identified in Section 5 that will be used to meet specific learner needs and improve instruction. This must include a description of how these evidence-based strategies support learners on Reading Improvement and Monitoring Plans (RIMPs).

Fountas and Pinnell Classroom Guided Reading, combined with a workshop approach, can be powerful tools for meeting specific learner needs and enhancing instruction, especially for students on Reading Improvement and Monitoring Plans (RIMPs). Here's how these evidence-based strategies can support learners and contribute to improved reading instruction:

Fountas and Pinnell Classroom Guided Reading:

Individualized Instruction:

Guided Reading allows for differentiated instruction tailored to each student's reading level. This is crucial for learners on RIMPs who may require personalized support to address specific skill gaps.

Targeted Assessment:

Fountas and Pinnell's approach involves continuous assessment to determine students' instructional levels and monitor progress. For students on RIMPs, ongoing assessment is vital to identify areas of improvement and adjust instruction accordingly.

Strategic Grouping:

Guided Reading groups are formed based on students' similar instructional needs. Learners on RIMPs can benefit from targeted, small-group instruction focused on addressing their specific challenges and accelerating their progress.

Explicit Instruction:

The Fountas and Pinnell approach emphasizes explicit teaching of reading strategies. This is essential for learners on RIMPs who may need additional support in developing foundational skills, comprehension strategies, or fluency.

Literacy Continuum:

Fountas and Pinnell provide a comprehensive Literacy Continuum that guides teachers in selecting appropriate texts and instructional strategies. This continuum can be particularly valuable for planning instruction that aligns with the diverse needs of students on RIMPs.

Workshop Approach:

Flexible Structure:

The workshop approach allows for flexibility in meeting diverse learner needs. It accommodates individual, small group, and whole-class instruction, providing opportunities for targeted support for students on RIMPs while also addressing the broader class needs.

Student Choice and Ownership:

The workshop model often incorporates elements of student choice, allowing learners to select texts that align with their interests and reading levels. This can enhance engagement and motivation, critical factors for students on RIMPs who may need additional encouragement.

Mini-Lessons:

Workshop models typically include brief, focused mini-lessons. These can be tailored to address specific skills or strategies identified in the RIMPs. Mini-lessons provide explicit instruction and practice opportunities for students to strengthen their reading abilities.

Formative Assessment:

The workshop approach integrates ongoing formative assessment, allowing teachers to gauge student progress and adjust instruction accordingly. This is especially valuable for learners on RIMPs, as it ensures that interventions are responsive and aligned with their evolving needs.

Collaborative Learning:

Workshops often involve collaborative learning experiences. For students on RIMPs, collaborative activities can provide peer support and additional opportunities for practice, contributing to a positive and supportive learning environment.

Integration with Reading Improvement and Monitoring Plans (RIMPs):

Data-Driven Decision Making:

Both Fountas and Pinnell Guided Reading and the workshop approach rely on data to inform instruction. This aligns with the principles of RIMPs, ensuring that interventions are based on ongoing assessment and analysis of student performance.

Targeted Intervention:

The individualized and small-group nature of Fountas and Pinnell Guided Reading, along with the flexibility of the workshop approach, allows teachers to provide targeted interventions aligned with the specific goals outlined in the RIMPs.

Progress Monitoring:

The continuous assessment and monitoring components of both strategies facilitate regular progress checks. This is essential for students on RIMPs, as it allows for the timely adjustment of interventions based on their evolving needs.

Professional Collaboration:

Both strategies promote collaboration among educators. This collaborative approach ensures that teachers working with students on RIMPs have opportunities to share insights, discuss progress, and collectively problem-solve to enhance instruction.

In summary, the combination of Fountas and Pinnell Classroom Guided Reading and a workshop approach creates a dynamic and responsive instructional framework. These evidence-based strategies are well-suited to meet the diverse needs of learners, including

those on Reading Improvement and Monitoring Plans. The emphasis on differentiation, continuous assessment, and targeted instruction aligns with the principles of effective intervention and supports the goal of improving overall reading proficiency.

SECTION 7 PART B: ENSURING EFFECTIVENESS AND IMPROVING UPON STRATEGIES (STRATEGIES TO SUPPORT ADULT IMPLEMENTATION)*

Describe how the district will ensure the proposed evidence-based strategies in Section 7, Part A will do the following:

1. *Be effective;*
2. *Show progress; and*
3. *Improve upon strategies utilized during the two prior consecutive school years.*

Ensuring the effectiveness, progress monitoring, and improvement of evidence-based strategies involves a systematic and data-driven approach. Here's how the school can address each of these aspects:

1. Ensuring Effectiveness:

a. Professional Development:

Provide comprehensive professional development for teachers to ensure a deep understanding of Fountas and Pinnell Classroom Guided Reading and the workshop approach. This can include workshops, training sessions, and ongoing support.

b. Implementation Fidelity:

Emphasize fidelity to the selected strategies by ensuring that teachers implement them as intended. Regular observations, walkthroughs, and coaching sessions can help maintain consistency and effectiveness in the classroom.

c. Data-Informed Decision Making:

Foster a culture of data-driven decision-making. Encourage teachers to use assessment data to inform instructional decisions, identify areas of improvement, and tailor interventions based on individual student needs.

d. Regular Evaluation and Feedback:

Establish a system for regular evaluation and feedback on the effectiveness of the strategies. This can involve teacher reflections, peer reviews, and feedback from students to identify strengths and areas for improvement.

2. Showing Progress:

a. Data Collection and Analysis:

**Section headings marked with an asterisk are required by state law.*

Implement a robust system for data collection and analysis. Regularly collect and analyze student performance data, including pre- and post-assessment results, to track progress and identify areas that need attention.

b. Progress Monitoring Tools:

Utilize progress monitoring tools, such as formative assessments and benchmark assessments aligned with the chosen strategies, to track individual and group progress. Ensure that these tools provide actionable insights for teachers.

c. Reporting Mechanisms:

Establish clear reporting mechanisms to communicate progress to stakeholders, including parents, teachers, and administrators. Regularly share data and progress updates during meetings, conferences, or through accessible platforms.

d. Goal Setting:

Collaboratively set realistic and measurable goals aligned with the school's improvement plan. These goals should be specific to student achievement, and progress toward them should be regularly assessed and communicated.

3. Improving Upon Prior Strategies:

a. Reflection on Past Practices:

Facilitate reflective practices among teachers and administrators to evaluate the effectiveness of strategies employed in the past two years. Identify strengths, challenges, and lessons learned to inform improvements.

b. Continuous Professional Development:

Offer ongoing professional development opportunities to address identified areas of improvement. This may involve targeted training sessions, workshops, or collaborative learning communities focused on refining instructional practices.

c. Actionable Feedback Mechanisms:

Implement systems for collecting actionable feedback from teachers, students, and parents. Use this feedback to make informed adjustments to the strategies and address any challenges that may have arisen during implementation.

d. Flexibility and Adaptability:

Foster a culture of flexibility and adaptability. Encourage educators to be responsive to student needs and willing to adjust strategies based on ongoing assessment data and feedback.

e. Collaborative Improvement Process:

Establish a collaborative improvement process that involves all stakeholders. Regularly convene meetings to discuss progress, share insights, and collaboratively problem-solve to address challenges and refine strategies.

By combining these approaches, the TISI can create a dynamic and responsive system that not only ensures the effectiveness of evidence-based strategies but also facilitates continuous improvement over the two prior consecutive school years. The key is to

foster a culture of reflection, collaboration, and data-driven decision-making to support the ongoing enhancement of instructional practices.

SECTION 7 PART C: STAFFING AND PROFESSIONAL DEVELOPMENT PLAN*

Insert a professional development plan that supports the evidence-based strategies proposed in the Reading Achievement Plan and clearly identifies the instructional staff involved in the professional development. Refer to the definition of professional development in the guidance document. Please indicate how the professional development activities are sustained, intensive, data-driven, and instructionally focused. Explain how the district is addressing Culturally Responsive Practice and the Science of Reading in the professional development plan.

See IG Professional Development Plan.

APPENDICES

If necessary, please include a glossary of terms, data summary, key messages, description of program elements, etc.



Grade Report

Grade 1

Term: Fall 2023-2024
District: Intergenerational Cleveland
School: The Intergenerational School

Norms Reference Data: 2020 Norms.
Weeks of Instruction: 4 (Fall 2023)
Grouping: None
Small Group Display: No

Language Arts: Reading

Summary	
Total Number of Students With Valid Growth Scores	23
Mean RIT Score	150.8
Standard Deviation	15.4
District Grade-Level Mean RIT	*
Students At or Above District Grade-Level Mean RIT	*
Grade-Level Mean RIT	155.9
Students At or Above Grade-Level Mean RIT	7

Overall Performance	Lo %ile < 21		LoAvg %ile 21-40		Avg %ile 41-60		HiAvg %ile 61-80		Hi %ile > 80		Mean RIT Score (+/- Smp Err)	Std Dev
	count	%	count	%	count	%	count	%	count	%		
Language Arts: Reading	8	35%	8	35%	1	4%	2	9%	4	17%	147-151-154	15.4

Explanatory Notes

Tests shown in gray are excluded from summary statistics. Either the test occurred outside the testing window for a term, had an invalid score, or was a repeat test for a student within a term.

Test Invalidation Reasons: ***1 The test duration was too short to provide a valid result. ***2 The overall RIT score for this test is above the valid range. ***3 The overall RIT score for this test is below the valid range.

***4 The standard error for this test is below acceptable limits. ***5 The standard error for this test is above acceptable limits. ***6 The test has been identified as invalid. ***7 High level of rapid guessing has invalidated test.

Due to statistical unreliability, summary data for groups of less than 10 are not shown.

* This data is not available for reporting. Please refer to help and documentation for more information.

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Grade Report

Grade 1

Term: Fall 2023-2024
District: Intergenerational Cleveland
School: The Intergenerational School

Norms Reference Data: 2020 Norms.
Weeks of Instruction: 4 (Fall 2023)
Grouping: None
Small Group Display: No

Language Arts: Reading

Growth: Reading K-2 OH 2017 / OH Learning Standards Language Arts: 2017

Summary	
Total Number of Students With Valid Growth Scores	23
Mean RIT Score	150.8
Standard Deviation	15.4
District Grade-Level Mean RIT	*
Students At or Above District Grade-Level Mean RIT	*
Grade-Level Mean RIT	155.9
Students At or Above Grade-Level Mean RIT	7

	Lo %ile < 21		LoAvg %ile 21-40		Avg %ile 41-60		HiAvg %ile 61-80		Hi %ile > 80		Mean RIT Score (+/- Smp Err)	Std Dev	
	count	%	count	%	count	%	count	%	count	%			
Overall Performance													
Growth: Reading K-2 OH 2017 / OH Learning Standards Language Arts: 2017	8	35%	8	35%	1	4%	2	9%	4	17%	147-151-154	15.4	
Instructional Area RIT Range													
Language and Writing	7	30%	7	30%	1	4%	4	17%	4	17%	149-152-156	16.1	
Literature and Informational	13	57%	2	9%	2	9%	3	13%	3	13%	146-149-153	16.4	
Foundational Skills	7	30%	5	22%	5	22%	1	4%	5	22%	149-153-156	16	
Vocabulary Use and Functions	8	35%	4	17%	4	17%	4	17%	3	13%	145-149-153	18.7	

Explanatory Notes

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Grade Report

Grade 2

Term: Fall 2023-2024
District: Intergenerational Cleveland
School: The Intergenerational School

Norms Reference Data: 2020 Norms.
Weeks of Instruction: 4 (Fall 2023)
Grouping: None
Small Group Display: No

Language Arts: Reading

Summary	
Total Number of Students With Valid Growth Scores	18
Mean RIT Score	165.8
Standard Deviation	10.9
District Grade-Level Mean RIT	*
Students At or Above District Grade-Level Mean RIT	*
Grade-Level Mean RIT	172.3
Students At or Above Grade-Level Mean RIT	5

Overall Performance	Lo %ile < 21		LoAvg %ile 21-40		Avg %ile 41-60		HiAvg %ile 61-80		Hi %ile > 80		Mean RIT Score (+/- Smp Err)	Std Dev
	count	%	count	%	count	%	count	%	count	%		
Language Arts: Reading	7	39%	3	17%	3	17%	5	28%	0	0%	163-166-168	10.9

Explanatory Notes

Tests shown in gray are excluded from summary statistics. Either the test occurred outside the testing window for a term, had an invalid score, or was a repeat test for a student within a term.

Test Invalidation Reasons: ***1 The test duration was too short to provide a valid result. ***2 The overall RIT score for this test is above the valid range. ***3 The overall RIT score for this test is below the valid range.

***4 The standard error for this test is below acceptable limits. ***5 The standard error for this test is above acceptable limits. ***6 The test has been identified as invalid. ***7 High level of rapid guessing has invalidated test.

Due to statistical unreliability, summary data for groups of less than 10 are not shown.

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Grade Report

Grade 2

Term: Fall 2023-2024
District: Intergenerational Cleveland
School: The Intergenerational School

Norms Reference Data: 2020 Norms.
Weeks of Instruction: 4 (Fall 2023)
Grouping: None
Small Group Display: No

Language Arts: Reading

Growth: Reading K-2 OH 2017 / OH Learning Standards Language Arts: 2017

Summary	
Total Number of Students With Valid Growth Scores	18
Mean RIT Score	165.8
Standard Deviation	10.9
District Grade-Level Mean RIT	*
Students At or Above District Grade-Level Mean RIT	*
Grade-Level Mean RIT	172.3
Students At or Above Grade-Level Mean RIT	5

	Lo %ile < 21		LoAvg %ile 21-40		Avg %ile 41-60		HiAvg %ile 61-80		Hi %ile > 80		Mean RIT Score (+/- Smp Err)	Std Dev
	count	%	count	%	count	%	count	%	count	%		
Overall Performance												
Growth: Reading K-2 OH 2017 / OH Learning Standards Language Arts: 2017	7	39%	3	17%	3	17%	5	28%	0	0%	163-166-168	10.9
Instructional Area RIT Range												
Language and Writing	5	28%	5	28%	3	17%	5	28%	0	0%	164-167-170	11.4
Literature and Informational	5	28%	5	28%	5	28%	2	11%	1	6%	162-165-168	12.7
Foundational Skills	7	39%	4	22%	6	33%	0	0%	1	6%	160-163-166	13.1
Vocabulary Use and Functions	5	28%	5	28%	3	17%	3	17%	2	11%	165-168-171	12.3

Explanatory Notes

Tests shown in gray are excluded from summary statistics. Either the test occurred outside the testing window for a term, had an invalid score, or was a repeat test for a student within a term.

Test Invalidation Reasons: ***1 The test duration was too short to provide a valid result. ***2 The overall RIT score for this test is above the valid range. ***3 The overall RIT score for this test is below the valid range.

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Due to statistical unreliability, summary data for groups of less than 10 are not shown.

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Grade Report

Grade 3

Term: Fall 2023-2024
District: Intergenerational Cleveland
School: The Intergenerational School

Norms Reference Data: 2020 Norms.
Weeks of Instruction: 4 (Fall 2023)
Grouping: None
Small Group Display: No

Language Arts: Reading

Summary	
Total Number of Students With Valid Growth Scores	28
Mean RIT Score	178.2
Standard Deviation	16.6
District Grade-Level Mean RIT	*
Students At or Above District Grade-Level Mean RIT	*
Grade-Level Mean RIT	186.6
Students At or Above Grade-Level Mean RIT	9

Overall Performance	Lo %ile < 21		LoAvg %ile 21-40		Avg %ile 41-60		HiAvg %ile 61-80		Hi %ile > 80		Mean RIT Score (+/- Smp Err)	Std Dev
	count	%	count	%	count	%	count	%	count	%		
Language Arts: Reading	10	36%	5	18%	9	32%	1	4%	3	11%	175-178-181	16.6

Explanatory Notes

Tests shown in gray are excluded from summary statistics. Either the test occurred outside the testing window for a term, had an invalid score, or was a repeat test for a student within a term.

Test Invalidation Reasons: ***1 The test duration was too short to provide a valid result. ***2 The overall RIT score for this test is above the valid range. ***3 The overall RIT score for this test is below the valid range.

***4 The standard error for this test is below acceptable limits. ***5 The standard error for this test is above acceptable limits. ***6 The test has been identified as invalid. ***7 High level of rapid guessing has invalidated test.

Due to statistical unreliability, summary data for groups of less than 10 are not shown.

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Grade Report

Grade 3

Term: Fall 2023-2024
District: Intergenerational Cleveland
School: The Intergenerational School

Norms Reference Data: 2020 Norms.
Weeks of Instruction: 4 (Fall 2023)
Grouping: None
Small Group Display: No

Language Arts: Reading

Growth: Reading 2-5 OH 2017 / OH Learning Standards Language Arts: 2017

Summary	
Total Number of Students With Valid Growth Scores	28
Mean RIT Score	178.2
Standard Deviation	16.6
District Grade-Level Mean RIT	*
Students At or Above District Grade-Level Mean RIT	*
Grade-Level Mean RIT	186.6
Students At or Above Grade-Level Mean RIT	9

	Lo %ile < 21		LoAvg %ile 21-40		Avg %ile 41-60		HiAvg %ile 61-80		Hi %ile > 80		Mean RIT Score (+/- Smp Err)	Std Dev
	count	%	count	%	count	%	count	%	count	%		
Overall Performance												
Growth: Reading 2-5 OH 2017 / OH Learning Standards Language Arts: 2017	10	36%	5	18%	9	32%	1	4%	3	11%	175-178-181	16.6
Instructional Area RIT Range												
Vocabulary: Acquisition and Use	10	36%	4	14%	9	32%	2	7%	3	11%	177-180-183	15.8
Informational Text: Language, Craft, and Structure	10	36%	6	21%	6	21%	4	14%	2	7%	174-178-181	17.3
Literary Text: Key Ideas and Details	10	36%	7	25%	5	18%	4	14%	2	7%	174-178-182	22.2
Informational Text: Key Ideas and Details	10	36%	7	25%	6	21%	5	18%	0	0%	172-176-179	16.6
Literary Text: Language, Craft, and Structure	11	39%	5	18%	5	18%	3	11%	4	14%	175-179-183	19.8

Explanatory Notes

Tests shown in gray are excluded from summary statistics. Either the test occurred outside the testing window for a term, had an invalid score, or was a repeat test for a student within a term.

Test Invalidation Reasons: ***1 The test duration was too short to provide a valid result. ***2 The overall RIT score for this test is above the valid range. ***3 The overall RIT score for this test is below the valid range.

***4 The standard error for this test is below acceptable limits. ***5 The standard error for this test is above acceptable limits. ***6 The test has been identified as invalid. ***7 High level of rapid guessing has invalidated test.

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Grade Report

Grade 4

Term: Fall 2023-2024
District: Intergenerational Cleveland
School: The Intergenerational School

Norms Reference Data: 2020 Norms.
Weeks of Instruction: 4 (Fall 2023)
Grouping: None
Small Group Display: No

Language Arts: Reading

Summary	
Total Number of Students With Valid Growth Scores	30
Mean RIT Score	187.2
Standard Deviation	16.5
District Grade-Level Mean RIT	*
Students At or Above District Grade-Level Mean RIT	*
Grade-Level Mean RIT	196.7
Students At or Above Grade-Level Mean RIT	10

Overall Performance	Lo %ile < 21		LoAvg %ile 21-40		Avg %ile 41-60		HiAvg %ile 61-80		Hi %ile > 80		Mean RIT Score (+/- Smp Err)	Std Dev
	count	%	count	%	count	%	count	%	count	%		
Language Arts: Reading	12	40%	5	17%	8	27%	4	13%	1	3%	184-187-190	16.5

Explanatory Notes

Tests shown in gray are excluded from summary statistics. Either the test occurred outside the testing window for a term, had an invalid score, or was a repeat test for a student within a term.

Test Invalidation Reasons: ***1 The test duration was too short to provide a valid result. ***2 The overall RIT score for this test is above the valid range. ***3 The overall RIT score for this test is below the valid range.

***4 The standard error for this test is below acceptable limits. ***5 The standard error for this test is above acceptable limits. ***6 The test has been identified as invalid. ***7 High level of rapid guessing has invalidated test.

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Grade Report

Grade 4

Term: Fall 2023-2024
District: Intergenerational Cleveland
School: The Intergenerational School

Norms Reference Data: 2020 Norms.
Weeks of Instruction: 4 (Fall 2023)
Grouping: None
Small Group Display: No

Language Arts: Reading

Growth: Reading 2-5 OH 2017 / OH Learning Standards Language Arts: 2017

Summary	
Total Number of Students With Valid Growth Scores	30
Mean RIT Score	187.2
Standard Deviation	16.5
District Grade-Level Mean RIT	*
Students At or Above District Grade-Level Mean RIT	*
Grade-Level Mean RIT	196.7
Students At or Above Grade-Level Mean RIT	10

	Lo %ile < 21		LoAvg %ile 21-40		Avg %ile 41-60		HiAvg %ile 61-80		Hi %ile > 80		Mean RIT Score (+/- Smp Err)	Std Dev
	count	%	count	%	count	%	count	%	count	%		
Overall Performance												
Growth: Reading 2-5 OH 2017 / OH Learning Standards Language Arts: 2017	12	40%	5	17%	8	27%	4	13%	1	3%	184-187-190	16.5
Instructional Area RIT Range												
Vocabulary: Acquisition and Use	10	33%	7	23%	6	20%	5	17%	2	7%	183-186-190	21.1
Informational Text: Language, Craft, and Structure	10	33%	5	17%	6	20%	8	27%	1	3%	187-190-193	16.7
Literary Text: Key Ideas and Details	10	33%	6	20%	7	23%	6	20%	1	3%	185-189-192	17.8
Informational Text: Key Ideas and Details	14	47%	5	17%	5	17%	5	17%	1	3%	182-185-188	16.7
Literary Text: Language, Craft, and Structure	11	37%	6	20%	7	23%	5	17%	1	3%	182-186-190	19.5

Explanatory Notes

Tests shown in gray are excluded from summary statistics. Either the test occurred outside the testing window for a term, had an invalid score, or was a repeat test for a student within a term.

Test Invalidation Reasons: ***1 The test duration was too short to provide a valid result. ***2 The overall RIT score for this test is above the valid range. ***3 The overall RIT score for this test is below the valid range.

***4 The standard error for this test is below acceptable limits. ***5 The standard error for this test is above acceptable limits. ***6 The test has been identified as invalid. ***7 High level of rapid guessing has invalidated test.

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Grade Report

Grade 5

Term: Fall 2023-2024
District: Intergenerational Cleveland
School: The Intergenerational School

Norms Reference Data: 2020 Norms.
Weeks of Instruction: 4 (Fall 2023)
Grouping: None
Small Group Display: No

Language Arts: Reading

Summary	
Total Number of Students With Valid Growth Scores	25
Mean RIT Score	201
Standard Deviation	13.2
District Grade-Level Mean RIT	*
Students At or Above District Grade-Level Mean RIT	*
Grade-Level Mean RIT	204.5
Students At or Above Grade-Level Mean RIT	11

Overall Performance	Lo %ile < 21		LoAvg %ile 21-40		Avg %ile 41-60		HiAvg %ile 61-80		Hi %ile > 80		Mean RIT Score (+/- Smp Err)	Std Dev
	count	%	count	%	count	%	count	%	count	%		
Language Arts: Reading	5	20%	5	20%	6	24%	8	32%	1	4%	198-201-204	13.2

Explanatory Notes

Tests shown in gray are excluded from summary statistics. Either the test occurred outside the testing window for a term, had an invalid score, or was a repeat test for a student within a term.

Test Invalidation Reasons: ***1 The test duration was too short to provide a valid result. ***2 The overall RIT score for this test is above the valid range. ***3 The overall RIT score for this test is below the valid range.

***4 The standard error for this test is below acceptable limits. ***5 The standard error for this test is above acceptable limits. ***6 The test has been identified as invalid. ***7 High level of rapid guessing has invalidated test.

Due to statistical unreliability, summary data for groups of less than 10 are not shown.

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Grade Report

Grade 5

Term: Fall 2023-2024
District: Intergenerational Cleveland
School: The Intergenerational School

Norms Reference Data: 2020 Norms.
Weeks of Instruction: 4 (Fall 2023)
Grouping: None
Small Group Display: No

Language Arts: Reading

Growth: Reading 2-5 OH 2017 / OH Learning Standards Language Arts: 2017

Summary	
Total Number of Students With Valid Growth Scores	25
Mean RIT Score	201
Standard Deviation	13.2
District Grade-Level Mean RIT	*
Students At or Above District Grade-Level Mean RIT	*
Grade-Level Mean RIT	204.5
Students At or Above Grade-Level Mean RIT	11

	Lo %ile < 21		LoAvg %ile 21-40		Avg %ile 41-60		HiAvg %ile 61-80		Hi %ile > 80		Mean RIT Score (+/- Smp Err)	Std Dev
	count	%	count	%	count	%	count	%	count	%		
Overall Performance												
Growth: Reading 2-5 OH 2017 / OH Learning Standards Language Arts: 2017	5	20%	5	20%	6	24%	8	32%	1	4%	198-201-204	13.2
Instructional Area RIT Range												
Vocabulary: Acquisition and Use												
Vocabulary: Acquisition and Use	4	16%	8	32%	7	28%	4	16%	2	8%	199-201-204	12.7
Informational Text: Language, Craft, and Structure												
Informational Text: Language, Craft, and Structure	8	32%	3	12%	3	12%	7	28%	4	16%	198-201-205	18.6
Literary Text: Key Ideas and Details												
Literary Text: Key Ideas and Details	7	28%	7	28%	4	16%	3	12%	4	16%	195-198-202	16.7
Informational Text: Key Ideas and Details												
Informational Text: Key Ideas and Details	4	16%	8	32%	7	28%	4	16%	2	8%	198-201-204	14.7
Literary Text: Language, Craft, and Structure												
Literary Text: Language, Craft, and Structure	6	24%	4	16%	4	16%	7	28%	4	16%	200-203-206	14.8

Explanatory Notes

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Grade Report

Grade 6

Term: Fall 2023-2024
District: Intergenerational Cleveland
School: The Intergenerational School

Norms Reference Data: 2020 Norms.
Weeks of Instruction: 4 (Fall 2023)
Grouping: None
Small Group Display: No

Language Arts: Reading

Summary	
Total Number of Students With Valid Growth Scores	21
Mean RIT Score	209.3
Standard Deviation	11.6
District Grade-Level Mean RIT	*
Students At or Above District Grade-Level Mean RIT	*
Grade-Level Mean RIT	210.2
Students At or Above Grade-Level Mean RIT	10

Overall Performance	Lo %ile < 21		LoAvg %ile 21-40		Avg %ile 41-60		HiAvg %ile 61-80		Hi %ile > 80		Mean RIT Score (+/- Smp Err)	Std Dev
	count	%	count	%	count	%	count	%	count	%		
Language Arts: Reading	2	10%	8	38%	6	29%	3	14%	2	10%	207-209-212	11.6

Explanatory Notes

Tests shown in gray are excluded from summary statistics. Either the test occurred outside the testing window for a term, had an invalid score, or was a repeat test for a student within a term.
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 ***4 The standard error for this test is below acceptable limits. ***5 The standard error for this test is above acceptable limits. ***6 The test has been identified as invalid. ***7 High level of rapid guessing has invalidated test.
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Grade Report

Grade 6

Term: Fall 2023-2024
District: Intergenerational Cleveland
School: The Intergenerational School

Norms Reference Data: 2020 Norms.
Weeks of Instruction: 4 (Fall 2023)
Grouping: None
Small Group Display: No

Language Arts: Reading

Growth: Reading 6+ OH 2017 / OH Learning Standards Language Arts: 2017

Summary	
Total Number of Students With Valid Growth Scores	21
Mean RIT Score	209.3
Standard Deviation	11.6
District Grade-Level Mean RIT	*
Students At or Above District Grade-Level Mean RIT	*
Grade-Level Mean RIT	210.2
Students At or Above Grade-Level Mean RIT	10

	Lo %ile < 21		LoAvg %ile 21-40		Avg %ile 41-60		HiAvg %ile 61-80		Hi %ile > 80		Mean RIT Score (+/- Smp Err)	Std Dev
	count	%	count	%	count	%	count	%	count	%		
Overall Performance												
Growth: Reading 6+ OH 2017 / OH Learning Standards Language Arts: 2017	2	10%	8	38%	6	29%	3	14%	2	10%	207-209-212	11.6
Instructional Area RIT Range												
Vocabulary: Acquisition and Use	1	5%	7	33%	3	14%	8	38%	2	10%	209-212-215	13.3
Informational Text: Language, Craft, and Structure	3	14%	9	43%	4	19%	2	10%	3	14%	205-208-211	15.2
Literary Text: Key Ideas and Details	2	10%	6	29%	7	33%	4	19%	2	10%	206-208-210	10.4
Informational Text: Key Ideas and Details	5	24%	6	29%	5	24%	3	14%	2	10%	203-206-209	13.5
Literary Text: Language, Craft, and Structure	3	14%	5	24%	5	24%	2	10%	6	29%	208-212-215	15.9

Explanatory Notes

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Grade Report

Grade 7

Term: Fall 2023-2024
District: Intergenerational Cleveland
School: The Intergenerational School

Norms Reference Data: 2020 Norms.
Weeks of Instruction: 4 (Fall 2023)
Grouping: None
Small Group Display: No

Language Arts: Reading

Summary	
Total Number of Students With Valid Growth Scores	30
Mean RIT Score	212
Standard Deviation	11.9
District Grade-Level Mean RIT	*
Students At or Above District Grade-Level Mean RIT	*
Grade-Level Mean RIT	214.2
Students At or Above Grade-Level Mean RIT	14

Overall Performance	Lo %ile < 21		LoAvg %ile 21-40		Avg %ile 41-60		HiAvg %ile 61-80		Hi %ile > 80		Mean RIT Score (+/- Smp Err)	Std Dev
	count	%	count	%	count	%	count	%	count	%		
Language Arts: Reading	5	17%	8	27%	5	17%	11	37%	1	3%	210-212-214	11.9

Explanatory Notes

Tests shown in gray are excluded from summary statistics. Either the test occurred outside the testing window for a term, had an invalid score, or was a repeat test for a student within a term.

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***4 The standard error for this test is below acceptable limits. ***5 The standard error for this test is above acceptable limits. ***6 The test has been identified as invalid. ***7 High level of rapid guessing has invalidated test.

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Grade Report

Grade 7

Term: Fall 2023-2024
District: Intergenerational Cleveland
School: The Intergenerational School

Norms Reference Data: 2020 Norms.
Weeks of Instruction: 4 (Fall 2023)
Grouping: None
Small Group Display: No

Language Arts: Reading

Growth: Reading 6+ OH 2017 / OH Learning Standards Language Arts: 2017

Summary	
Total Number of Students With Valid Growth Scores	30
Mean RIT Score	212
Standard Deviation	11.9
District Grade-Level Mean RIT	*
Students At or Above District Grade-Level Mean RIT	*
Grade-Level Mean RIT	214.2
Students At or Above Grade-Level Mean RIT	14

	Lo %ile < 21		LoAvg %ile 21-40		Avg %ile 41-60		HiAvg %ile 61-80		Hi %ile > 80		Mean RIT Score (+/- Smp Err)	Std Dev
	count	%	count	%	count	%	count	%	count	%		
Overall Performance												
Growth: Reading 6+ OH 2017 / OH Learning Standards Language Arts: 2017	5	17%	8	27%	5	17%	11	37%	1	3%	210-212-214	11.9
Instructional Area RIT Range												
Vocabulary: Acquisition and Use	5	17%	10	33%	6	20%	8	27%	1	3%	208-210-213	13.3
Informational Text: Language, Craft, and Structure	6	20%	9	30%	4	13%	9	30%	2	7%	208-211-214	15.1
Literary Text: Key Ideas and Details	5	17%	7	23%	8	27%	8	27%	2	7%	208-211-213	14.8
Informational Text: Key Ideas and Details	3	10%	11	37%	8	27%	7	23%	1	3%	209-211-214	13.1
Literary Text: Language, Craft, and Structure	3	10%	4	13%	11	37%	6	20%	6	20%	215-217-220	13.4

Explanatory Notes

Tests shown in gray are excluded from summary statistics. Either the test occurred outside the testing window for a term, had an invalid score, or was a repeat test for a student within a term.

Test Invalidation Reasons: ***1 The test duration was too short to provide a valid result. ***2 The overall RIT score for this test is above the valid range. ***3 The overall RIT score for this test is below the valid range.

***4 The standard error for this test is below acceptable limits. ***5 The standard error for this test is above acceptable limits. ***6 The test has been identified as invalid. ***7 High level of rapid guessing has invalidated test.

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Grade Report

Grade 8

Term: Fall 2023-2024
District: Intergenerational Cleveland
School: The Intergenerational School

Norms Reference Data: 2020 Norms.
Weeks of Instruction: 4 (Fall 2023)
Grouping: None
Small Group Display: No

Language Arts: Reading

Summary	
Total Number of Students With Valid Growth Scores	23
Mean RIT Score	208.7
Standard Deviation	14.1
District Grade-Level Mean RIT	*
Students At or Above District Grade-Level Mean RIT	*
Grade-Level Mean RIT	218
Students At or Above Grade-Level Mean RIT	6

Overall Performance	Lo %ile < 21		LoAvg %ile 21-40		Avg %ile 41-60		HiAvg %ile 61-80		Hi %ile > 80		Mean RIT Score (+/- Smp Err)	Std Dev
	count	%	count	%	count	%	count	%	count	%		
Language Arts: Reading	8	35%	7	30%	3	13%	5	22%	0	0%	206-209-212	14.1

Explanatory Notes

Tests shown in gray are excluded from summary statistics. Either the test occurred outside the testing window for a term, had an invalid score, or was a repeat test for a student within a term.

Test Invalidation Reasons: ***1 The test duration was too short to provide a valid result. ***2 The overall RIT score for this test is above the valid range. ***3 The overall RIT score for this test is below the valid range.

***4 The standard error for this test is below acceptable limits. ***5 The standard error for this test is above acceptable limits. ***6 The test has been identified as invalid. ***7 High level of rapid guessing has invalidated test.

Due to statistical unreliability, summary data for groups of less than 10 are not shown.

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Grade Report

Grade 8

Term: Fall 2023-2024
District: Intergenerational Cleveland
School: The Intergenerational School

Norms Reference Data: 2020 Norms.
Weeks of Instruction: 4 (Fall 2023)
Grouping: None
Small Group Display: No

Language Arts: Reading

Growth: Reading 6+ OH 2017 / OH Learning Standards Language Arts: 2017

Summary	
Total Number of Students With Valid Growth Scores	23
Mean RIT Score	208.7
Standard Deviation	14.1
District Grade-Level Mean RIT	*
Students At or Above District Grade-Level Mean RIT	*
Grade-Level Mean RIT	218
Students At or Above Grade-Level Mean RIT	6

	Lo %ile < 21		LoAvg %ile 21-40		Avg %ile 41-60		HiAvg %ile 61-80		Hi %ile > 80		Mean RIT Score (+/- Smp Err)	Std Dev
	count	%	count	%	count	%	count	%	count	%		
Overall Performance												
Growth: Reading 6+ OH 2017 / OH Learning Standards Language Arts: 2017	8	35%	7	30%	3	13%	5	22%	0	0%	206-209-212	14.1
Instructional Area RIT Range												
Vocabulary: Acquisition and Use	5	22%	8	35%	5	22%	2	9%	3	13%	209-212-216	16.7
Informational Text: Language, Craft, and Structure	8	35%	8	35%	3	13%	2	9%	2	9%	206-209-212	14.5
Literary Text: Key Ideas and Details	11	48%	3	13%	6	26%	3	13%	0	0%	203-206-210	15.1
Informational Text: Key Ideas and Details	9	39%	4	17%	5	22%	5	22%	0	0%	204-208-211	16.4
Literary Text: Language, Craft, and Structure	10	43%	2	9%	7	30%	3	13%	1	4%	204-207-211	17.4

Explanatory Notes

Tests shown in gray are excluded from summary statistics. Either the test occurred outside the testing window for a term, had an invalid score, or was a repeat test for a student within a term.

Test Invalidation Reasons: ***1 The test duration was too short to provide a valid result. ***2 The overall RIT score for this test is above the valid range. ***3 The overall RIT score for this test is below the valid range.

***4 The standard error for this test is below acceptable limits. ***5 The standard error for this test is above acceptable limits. ***6 The test has been identified as invalid. ***7 High level of rapid guessing has invalidated test.

Due to statistical unreliability, summary data for groups of less than 10 are not shown.

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Grade Report

Grade K

Term: Fall 2023-2024
District: Intergenerational Cleveland
School: The Intergenerational School

Norms Reference Data: 2020 Norms.
Weeks of Instruction: 4 (Fall 2023)
Grouping: None
Small Group Display: No

Language Arts: Reading

Summary	
Total Number of Students With Valid Growth Scores	17
Mean RIT Score	137.1
Standard Deviation	9.6
District Grade-Level Mean RIT	*
Students At or Above District Grade-Level Mean RIT	*
Grade-Level Mean RIT	136.6
Students At or Above Grade-Level Mean RIT	7

Overall Performance	Lo %ile < 21		LoAvg %ile 21-40		Avg %ile 41-60		HiAvg %ile 61-80		Hi %ile > 80		Mean RIT Score (+/- Smp Err)	Std Dev
	count	%	count	%	count	%	count	%	count	%		
Language Arts: Reading	1	6%	5	29%	7	41%	1	6%	3	18%	135-137-140	9.6

Explanatory Notes

Tests shown in gray are excluded from summary statistics. Either the test occurred outside the testing window for a term, had an invalid score, or was a repeat test for a student within a term.

Test Invalidation Reasons: ***1 The test duration was too short to provide a valid result. ***2 The overall RIT score for this test is above the valid range. ***3 The overall RIT score for this test is below the valid range.

***4 The standard error for this test is below acceptable limits. ***5 The standard error for this test is above acceptable limits. ***6 The test has been identified as invalid. ***7 High level of rapid guessing has invalidated test.

Due to statistical unreliability, summary data for groups of less than 10 are not shown.

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Grade Report

Grade K

Term: Fall 2023-2024
District: Intergenerational Cleveland
School: The Intergenerational School

Norms Reference Data: 2020 Norms.
Weeks of Instruction: 4 (Fall 2023)
Grouping: None
Small Group Display: No

Language Arts: Reading

Growth: Reading K-2 OH 2017 / OH Learning Standards Language Arts: 2017

Summary	
Total Number of Students With Valid Growth Scores	17
Mean RIT Score	137.1
Standard Deviation	9.6
District Grade-Level Mean RIT	*
Students At or Above District Grade-Level Mean RIT	*
Grade-Level Mean RIT	136.6
Students At or Above Grade-Level Mean RIT	7

	Lo %ile < 21		LoAvg %ile 21-40		Avg %ile 41-60		HiAvg %ile 61-80		Hi %ile > 80		Mean RIT Score (+/- Smp Err)	Std Dev
	count	%	count	%	count	%	count	%	count	%		
Overall Performance												
Growth: Reading K-2 OH 2017 / OH Learning Standards Language Arts: 2017	1	6%	5	29%	7	41%	1	6%	3	18%	135-137-140	9.6
Instructional Area RIT Range												
Language and Writing	2	12%	2	12%	7	41%	3	18%	3	18%	136-138-141	10.1
Literature and Informational	3	18%	2	12%	4	24%	5	29%	3	18%	136-139-142	11.3
Foundational Skills	6	35%	4	24%	4	24%	1	6%	2	12%	130-133-136	12.1
Vocabulary Use and Functions	1	6%	4	24%	6	35%	2	12%	4	24%	136-138-141	11.7

Explanatory Notes

Tests shown in gray are excluded from summary statistics. Either the test occurred outside the testing window for a term, had an invalid score, or was a repeat test for a student within a term.

Test Invalidation Reasons: ***1 The test duration was too short to provide a valid result. ***2 The overall RIT score for this test is above the valid range. ***3 The overall RIT score for this test is below the valid range.

***4 The standard error for this test is below acceptable limits. ***5 The standard error for this test is above acceptable limits. ***6 The test has been identified as invalid. ***7 High level of rapid guessing has invalidated test.

Due to statistical unreliability, summary data for groups of less than 10 are not shown.

* This data is not available for reporting. Please refer to help and documentation for more information.

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Coversheet

ESCLEW Update

Section: II. Sponsor Update
Item: A. ESCLEW Update
Purpose: FYI
Submitted by:
Related Material: TIS - sponsor update December.docx



Educational Service Center of Lake Erie West Community Schools Center

ESC of Lake Erie West Community Schools Center Sponsor Update

School Name: The Intergenerational School

Month: December

Presented by:	Joyce Lewis	In Person
Governing Authority Highlights / Important updates from ESCLEW	<p>With the end of the COVID era and the release of the FY23 Ohio School Report Cards, several legislative determinations that were previously placed in Safe Harbor have come back to identify our community schools. Two of those requirements are part of the current Literacy movement - the Reading Intervention Plan and the Reading Achievement Plan. Currently The Intergenerational School is only required to complete the Reading Improvement Plan.</p>	
Recent Site Visit Highlights	<p>During the November site visits, we assessed progress on the 11.6 goals, discussed the climate and culture of the building, and reviewed the status of PBIS. Student interviews were conducted, revealing their perspectives on school safety and their appreciation for teachers. For the upcoming December site visits, our agenda includes a comprehensive review of student files to ensure compliance and a check on the progress of the Reading Improvement Plan, along with monitoring the completion of Food Service/Heimlich training.</p>	
Financial Update	<p>Our Financial consultant Linda Moye holds a monthly phone meeting with the school's treasurer. A completed report of this meeting is emailed to all board members. At this time, there were no red flags discussed. If you have any questions regarding your school's financials, we encourage you to reach out to your treasurer.</p>	
Any questions asked by the Governing Authority for the Sponsor?		
Follow up provided		



Educational Service Center of Lake Erie West Community Schools Center

School Governance Performance Targets and Metrics					
Measure Domain	Assessment	Exceeds the Standard (6 points)	Meets the Standard (4 points)	Approaches the Standard (2 points)	Falls Below the Standard (0 points)
School Governance	Board Engagement	100% of board members attend two (2) or more school visits or school-sponsored events	100% of board members attend at least one (1) school visit or school-sponsored event	At least one board member attends at least one (1) school visit or school-sponsored event	Zero (0) board members attend a school visit or school-sponsored event
Evidence: Joanna Lopez Inman- Attended Fall Festival					
School Governance	Required Number of Regular Board Meetings		Six (6) Meetings held per year	Five (5) meetings held per year	Four (4) or fewer meetings held per year
Evidence: Board meetings have occurred during the following months: August October					
School Governance	Required Number of Board Members		Five (5) or more sponsor approved board members for all meetings		Fewer than five (5) sponsor approved board members for one (1) or more meetings
Evidence: They currently have 7 board members					
School Governance	Proper Meeting Notice		Timely public notice for all meetings, reschedules, and cancellations	Timely public notice not provided for one (1) meeting, reschedule, or cancellation	Timely public notice not provided for two (2) or more meetings, reschedules, or cancellations
Evidence: At this time all meetings have had timely public notice.					



Educational Service Center of Lake Erie West Community Schools Center

School Governance	Required Board Member Training		Completion of Open Meetings and Public Records for 100% of board members	Completion of Open Meetings and Public Records for 80-99% of board members	Completion of Open Meetings and Public Records for less than 80% of board members
Evidence: Not Started					
School Governance	Board Member Attendance	Overall member attendance is <input type="checkbox"/> 90%	Overall member attendance is between 80-90%	Overall member attendance is between 70-79%	Overall member attendance is <input type="checkbox"/> 70%
Evidence: Attendance will begin in November.					

Coversheet

CMSD Sponsor Update

Section: II. Sponsor Update
Item: B. CMSD Sponsor Update
Purpose: FYI
Submitted by:
Related Material: 2023 Renewal Report- Near West Intergenerational School.pdf
LIS Fall 2023 FINAL.pdf
NWIS Fall 2023 FINAL.pdf
2022-23 CMSD Annual Charter School Sponsorship Report.pdf
CharterNewsletter_Dec-Jan-24.pdf



Charter Renewal Report

School: Near West Intergenerational School

Contract Term: July 1, 2019 - June 30, 2024

Date: December 5, 2023

Final Score: 143.57/150

96%

Recommendation: Renew

Purpose of a Renewal Application and Process

Charter schools (also called community schools in Ohio) play a critical role in offering families quality school choice. In order to ensure that the school choices are indeed of high quality, charter schools must be held accountable for performance by their sponsors. A strong charter renewal process is critical to protect students and the public interest, and to protect charter school autonomy, by ensuring that schools are held to high standards of academic, financial, and organizational performance. The renewal process also provides the school an opportunity to present clear and compelling evidence demonstrating how it is serving its students and meeting contractual expectations in order to determine whether the school has earned renewal based on its performance record. While a school's past and current record of performance will be the primary focus of Cleveland Metropolitan School District's (CMSD's) renewal decision, the renewal process also provides an opportunity for each school to outline its future plans, priorities, and potential modifications to its charter if renewed.

Performance Framework as the Basis for Renewal

CMSD uses a Performance Framework that sets out expectations for each charter school as the basis for its renewal decisions. Charter schools must meet standards in that performance framework in order to have their charter renewed. The Performance Framework is included in the school's charter contract and includes academic, organizational, and financial standards. The contract renewal process examines a multitude of criteria to develop a comprehensive portrait of the school and considers the school's past, present, and future. The most important component of the process is reviewing the school's past performance on the frameworks. The academic performance of the school is considered most heavily, but each school also must meet financial and organizational performance standards in order to earn renewal.

Board of Education Policy Alignment with State and National Standards

CMSD's renewal process is guided by the CMSD Board of Education's Policy on Renewal, Nonrenewal, and Termination of Community School Sponsorship Contracts. Under the policy, the Board bases the contract renewal process and renewal decisions on a thorough analysis of a comprehensive body of objective evidence defined by the Performance Framework.

The Board's policy and the process it outlines are aligned with state and national standards for quality charter school sponsorship or authorizing. The process is designed to meet the Ohio Department of Education's (ODE) standards for Sponsor Quality Practices concerning the renewal process and renewal decision making,¹ including the following:

- The sponsor has an application process and requires all schools seeking renewal to apply through a written renewal application.
- The criteria for renewal are publicly available and include written guidance regarding the renewal application, as well as a timeline and specific criteria used to evaluate the application that considers multiple sources of evidence, both academic and non-academic, in a high-stakes review of the school's performance results over the term of its current contract.
- The sponsor only grants renewal to schools that are fiscally and organizationally viable, have achieved contractual academic targets, and are faithful to the non-academic terms of their contract.

Likewise, CMSD's Board policy and process are designed to meet national professional standards for the renewal process and renewal decision making set forth in the National Association of Charter School Authorizers' (NACSA)

¹ Ohio Department of Education Sponsor Quality Practices Rubric, Section E. Available [here](#).

Principles & Standards for Quality Charter School Authorizing², including:

- *A quality authorizer:*
 - *Designs and implements a transparent and rigorous process that uses comprehensive academic, financial, and operational performance data to make merit-based renewal decisions*
 - *Requires any school seeking renewal to apply for it through a renewal application, which provides the school a meaningful opportunity and reasonable time to respond to the cumulative report; to correct the record, if needed; and to present additional evidence regarding its performance*

Overview of the Renewal Process

CMSD's renewal process is a multi-stage review of each school's performance, with the following stages:

Stage 1: Renewal Performance Report

During the first stage of the renewal process, CMSD prepares a renewal performance report for each school eligible for renewal. The renewal performance report constitutes CMSD's record of the charter school's academic, financial, and organizational performance over the contract term in relation to the criteria for renewal and the school's obligations as outlined in its charter contract. The report states the authorizer's summative findings concerning the school's performance and its prospects for renewal. Schools will have an opportunity in the next stage to comment on the renewal performance report and to propose corrections or submit additional contextual information to supplement the record.

Stage 2: Charter Renewal Application

The second stage of the process requires the school to prepare and submit this Renewal Application. The application is aligned with the performance expectations set forth in the charter contract and provides schools with the opportunity to augment, or if needed correct, their performance record as reflected in the Renewal Performance Report. The Renewal Application also provides an opportunity to outline the school's future plans, priorities, and potential modifications to its charter if renewed. However, the school's past and current record of performance, and not its future plans or promises, will be the primary focus of CMSD's renewal decision.

Stage 3: Site Visit, Collecting of Additional Information, and Renewal Application Analysis

In the third stage of the process, CMSD will conduct a renewal site visit to each school applying for renewal. The site visit will include meetings with key school personnel and governing authority members, and CMSD will produce a report based on the site visit. CMSD will analyze the school's application using renewal criteria.

Stage 4: Renewal Recommendations Presented to CMSD Board, and Decisions Made in Public Meeting

Once all information has been collected, analyzed, and synthesized, CMSD staff will prepare a renewal recommendation for each school and present it to the CMSD Board of Education. Staff will only recommend schools for renewal that earn at least 66 percent of possible points on the application, which is at least 99 out of 150. Each school will receive its renewal recommendation prior to its being made public. The renewal recommendation may include comments from the school or information supplemental to CMSD's findings, if the school offers any. CMSD's Charter Schools Office will present each renewal recommendation to the CMSD Board, and the Board's decision to renew or not renew a charter will be made in a public meeting.

² National Association of Charter School Authorizers' (NACSA) Principles & Standards for Quality Charter School Authorizing. Available [here](#).

Stage 5: Renewal or Non-Renewal Next Steps

If the renewal is approved, the school will begin negotiating its next charter contract with CMSD, and the Renewal Application will help guide discussions regarding adjustments to be made in the new contract. If the renewal is denied, CMSD will proceed consistent with state law and ODE standards that govern sponsors on charter school appeal of a non-renewal decision and on non-renewal or termination. (See Ohio Revised Code section 3314.07).

Please note that Ohio law prohibits a charter school whose contract is terminated or non-renewed for failure to meet generally accepted standards of fiscal management, or for failure to meet student performance requirements, from entering into a contract with any other sponsor. (See Ohio Revised Code section 3314.07 (B) (5)).

Overview of Scoring

The Renewal Application is divided into four sections, each of which is assigned weighting and a methodology for scoring. To be considered for approval, applicants must earn at least 66%. **Please note, however, that earning the minimum percentage of required points is not automatically sufficient to guarantee a recommendation for renewal.**

The sections and their assigned point values are:

- Section A, the Performance Review, is worth 140 points total. Up to 50 points may be earned for section A1 (Academic Performance), and up to 45 points each for sections A2 (Financial Performance) and A3 (Organizational Performance). CMSD will provide this section of the application in the form of the final renewal performance report by September 29, 2023.
- Section B, Renewal Site Visit, is worth up to 10 points.
- Section C is not scored but affords the applicant an opportunity to reflect on the data that were included in the renewal performance report and address any challenges the school faced and how it overcame them as well as address financial performance and any applicable corrective actions.
- Section D, Future Plans, is not scored. The section gives the applicant an opportunity to provide important information that is relevant to the school's next contract term, if any.

A. Performance Review (140 points)

Section A is an assessment of the school's performance on the Performance Framework (Attachment 4 of the charter contract) during the school's current contract term. CMSD provided the data for this section in the form of the renewal performance report.

A1. Academic Performance (50 points)

CMSD has assessed the school's performance based on the Academic Performance Framework and has provided an analysis of the school's academic performance over the term of the charter contract in the school's renewal performance report.

Year	Standards Met	Standards
2019-20*	1	1
2020-21*	1	1
2021-22	5	5
2022-23	7	7
TOTAL	12	12
POINTS	50	

*Attendance indicator only. Not included in calculations due to accountability changes during the pandemic.

A2. Financial Performance (45 points)

CMSD has been assessing the school's financial performance monthly, quarterly, and annually in accordance with the Financial Performance Framework and has provided the school with monthly reviews and feedback on the school's latest enrollment and financial records. CMSD also has provided an analysis of the school's financial performance over the term of the charter in the school's renewal performance report.

Year	Standards Met	Standards
2019-20	7	7
2020-21	7	7
2021-22	6	7
2022-23	6	7
TOTAL	26	28
POINTS	41.79	

A3. Organizational Performance (45 points)

CMSD has been assessing the school's performance on the Organizational Performance Framework. CMSD also has provided an analysis of the school's organizational performance over the term of the charter contract in the school's renewal performance report.

Year	Standards Met	Standards
2019-20	4.95	5
2020-21	5	5
2021-22	5	5
2022-23	4.95	5
TOTAL	19.9	20
POINTS	44.78	

Scoring for this section:

CMSD will add the number of performance indicators met over the contract term, and the resulting number will be divided by the number of possible points for that area over the contract term. The resulting fraction will be multiplied by the number of points available for that section (e.g., academics is worth 50 points).

The overall score for Section A would be based on the combined points earned from the three categories (Academic, Financial, and Organization).

B. Renewal Site Visit (10 points)

As part of the charter renewal process, CMSD conducts renewal site visits aligned to the standards to augment evidence collected through the Performance Framework. The renewal site visit is designed to help evaluate objectively the success of the school, whether it is meeting its mission to provide a high-quality public education to its students, and what the outlook for the school's performance may be if it is granted a new contract. The site visits are conducted to ensure a thorough review of each school and to provide an opportunity to see the school in action. For this reason, site visits will be planned with reference to each school's renewal performance report and may differ in length, scope, and depth based on the school's past performance and current standing with CMSD. Areas explored may include, but need not be limited to, school and school community culture, leadership, instruction, support for all learners, professional development, and organizational reflection and planning.

Scoring for this Section:

Site visits will utilize a rubric, to be shared with the schools prior to the visit, and schools will receive ratings across different components, as well as an overall numerical rating, based on how much the site visit inspires confidence that the school currently is engaging in, and/or is likely to engage in, a range of effective practices that are likely to accomplish the school's mission and fulfill the terms of a future charter contract, including the Performance Framework. The points awarded for this section will range from 0 to 10, based on the renewal site visit rubric.

Rated Quality Standards

Quality Standard 1: The Quality of Instructional Practices (Classroom Climate) – meets expectations (1.5)

Quality Standard 2: The Quality of Instructional (Purposeful Teaching) – meets expectations (1.5)

Quality Standard 3: The Quality of Students' Supports – approaches expectations (1.0)

Quality Standard 4: The Quality of Educators' Supports – meets expectations (1.5)

Quality Standard 5: The Quality of School Leadership and Management – meets expectations (1.5)

Overall Renewal Site Visit Score: 7/10

C. Closer Look (Unscored)

Section C comprises three components: Reflection on Current Term, the Status Update on Financial Performance, and the Status Update on Remedial Action Plans.

Section C is unscored but affords the applicant an opportunity to correct what it believes to be any errors in the renewal performance report and/or to provide additional contextual information that the applicant believes will help CMSD better understand the data from the Performance Review and evaluate the application.

C1. Reflection on Current Term

The applicant should use the renewal performance report as a guide for its responses and submit only a) proposed corrections to what it believes is erroneous information in the report, or b) evidence of performance related to the Performance Framework that is not already included in the renewal performance report and/or that CMSD may not have and that the applicant believes will assist CMSD in better understanding, or placing into context, the data contained in the Performance Review. Responses should reference the specific criteria and benchmarks in the Performance Framework to which the supplemental information applies.

Such responses may include, but need not be limited to, information about interim assessments or progress reports; evidence of performance on school- or mission-specific goals; and improvements undertaken at the school, along with evidence of progress for any areas in which the school has not previously met or is not currently meeting the performance standard.

Responses should not include anecdotal information or evidence that is not relevant to the school's academic, financial, or organizational performance and the school's performance expectations as defined by CMSD's Performance Framework and the school's charter contract.

Although this section of the application is not assigned points, it still could prove very significant for the applicant. Again, achieving the minimum threshold of points does not guarantee a recommendation for renewal. In addition, the fullest amount of information on the school may factor into determinations about what length of contract term a renewed school will receive, as well as about what the other terms of the subsequent charter contract may include.

Scoring for this Section:

This section is not worth any points and will not be scored.

Notes/Questions from Renewal Team:

- The school noted a thoughtful approach to using their internal data to identify areas for improvement and acting upon them.
- The school noted changes over the years in commitment to its multiage model, and discussed efforts to recommit to this by supporting educators.
- The school reviewed their efforts post-pandemic to rebuild the intergenerational communities that are a key part of their model.

C2. Status Update on Financial Performance (Unscored)

This section will be based on CMSD's review of the school's most recent financial reports and records as are available from the current school year. CMSD will seek assurance that the school is on solid financial footing and that it is current in meeting its liabilities, including but not limited to payroll taxes, debt service payments, and employee benefits. In order to make this determination, CMSD may request additional information from the school to supplement the records it already possesses.

Scoring for this Section:

Under the Performance Framework, in order for the school to be considered for contract renewal, any area of

concern must be addressed with sufficient documentation, as determined by CMSD, demonstrating short- and long-term financial viability.

If the school enters into a new remedial action plan during the renewal process, CMSD will factor this into the renewal decision.

C3. Status Update on Remedial Action Plans (Unscored)

In this section, the school submits an update on its implementation of any still incomplete remedial action plan that was required of the school by CMSD under the Intervention Protocol in the school's contract. If you are unsure whether your school is, or should be, on a remedial action plan, please contact CMSD Executive Director of Charter Schools Matthew Rado at Matthew.Rado@clevelandmetroschools.org.

Please explain:

1. The circumstances that gave rise to the notice of breach and the remedial action plan;
2. The school's progress so far in implementing the remedial action plan;
3. The outlook and timeline for completion of the plan; and
4. What measures the school has taken to prevent the circumstances that gave rise to the remedial action plan, including specifically any actions or measures taken by the governing authority board.

Scoring for this Section:

Under the Performance Framework, in order for the school to be considered for contract renewal, any area of concern must be resolved or the school must be making acceptable progress on completing any current remedial action plan. In addition, in order for the school to be considered for contract renewal, it is expected to have no outstanding notice of breach or concern for which it has failed to submit a remedial action plan that has been approved by CMSD.

If the school enters into a new remedial action plan during the renewal process, CMSD will factor this into the renewal decision.

Notes/Questions from Renewal Team: The school has no remedial action plans.

D. Future Plans (Unscored)

Section D provides the school an opportunity to discuss its proposed plans for the term of the next charter contract. In particular, this section gives the applicant an opportunity to identify any significant changes it envisions for the school during the new contract term, as well as its plans for addressing any significant performance and operational challenges it has faced during the current contract term.

Schools should identify any anticipated changes to the school's educational program, governance model, and financial outlook and should include any other proposed changes that would require modification of a material provision in the school's charter contract and/or that are likely to impact the school's academic or organizational success or its financial sustainability. As a general rule, the school should identify any changes that are relevant or significant with respect to the performance outcomes that the school has agreed to meet or are otherwise relevant to the school's renewal and continued authorization and operation as a public charter school.

Examples of significant changes could include changes in the ages and grades of students the school proposes to serve or the characteristics of the students the school expects to attract; a shift in the focus of the curriculum; changes to delivery by in-person, virtual, or blended instruction; anticipated changes to the school's financial position or the financial impact of any significant proposed modifications to school's education program and operations; changes to the school governance, leadership, or staffing model, or any proposed changes to the

management of the school, including the school’s relationship with a third-party charter management organization or other education service provider; or changes to the school’s facility needs, status, or location.

CMSD may request additional information to sufficiently assess the impact of, and plan for, such proposed changes. Even if the school’s proposed changes would not occur until several years into the next charter contract term, the applicant should outline them here.

Contractual provisions are subject to approval by CMSD consistent with CMSD policy and state law. Failure to provide requested or otherwise relevant information, or failure to identify a material modification that is likely to raise contractual issues and/or to impact the school’s academic or organizational success or its financial sustainability, may be grounds for non-renewal and termination of the school’s charter. If the school has any questions about whether particular information or a proposed change should be included, please contact CMSD’s Charter Schools Office prior to submitting this application.

Regardless of whether a school anticipates or proposes any changes significant enough to potentially impact the school’s performance success and/or to warrant consideration of contract terms, the applicant should use this section to reflect upon its current contract term and identify any significant performance and operational challenges the school has faced and continues to face. Looking forward, the applicant should identify any new challenges it anticipates in the coming contract term. For each challenge identified, the applicant should indicate what strategies it proposes to employ during the next contract term to address the challenge and what degree of success it anticipates in overcoming the challenge.

If the school’s application for renewal is approved, the plans presented in this response will inform the drafting of relevant sections of the charter contract for the new term.

Scoring for this Section:

This section is unscored. CMSD expects that the school will thoughtfully and candidly identify, and propose well thought-out and credible strategies for addressing, current and anticipated performance and operational challenges. If applicable, this would include the applicant’s identification of significant changes to important aspects of the school’s operation and/or charter contract provisions in a new contract term.

Notes/Questions from Renewal Team:

- The school discussed their efforts with the support of an outside consultant to develop new school improvement plans for all three of their schools.
- The team noted a lack of instructional goals in this section.
- The team is concerned about the sustainability of the academic and DEI plans.
- The team is interested in learning more about the status of the new teacher scope and sequence.

Overall Score Summary Table

Section	Earned Points	Possible Points
Academic Performance	50	50
Financial Performance	41.79	45
Organizational Performance	44.78	45
Renewal Site Visit	7	10
Total	143.57	150

Recommendation

Based on the performance data and additional information summarized above, and on the school's overall renewal application score of 143.57 out of 150 points possible, the reviewers recommend CMSD's renewal of Near West Intergenerational School for a new sponsorship contract term.



Charter Renewal Site Visit Report

Near West Intergenerational School

November 2023

Review Information:

As part of the charter renewal process, CMSD conducts renewal site visits aligned to the standards to augment evidence collected through the Performance Framework. The renewal site visit is designed to help evaluate objectively the success of the school, whether it is meeting its mission to provide a high-quality public education to its students, and what the outlook for the school's performance may be if it is granted a new contract. The site visits are conducted to ensure a thorough review of each school and to provide an opportunity to see the school in action. For this reason, site visits will be planned with reference to each school's renewal performance report and may differ in length, scope, and depth based on the school's past performance and current standing with CMSD. Areas explored may include, but need not be limited to, school and school community culture, leadership, instruction, support for all learners, professional development, and organizational reflection and planning.

The CMSD Renewal Site Visit took place at Near West Intergenerational School on November 6, 2023 from 7:00 am to 4:30 pm. The site visit was conducted by a team of educational consultants (Toni Cross and Mary McCool Berry) and by a CMSD School Quality Manager (Meagan Coggins). The site visit team collected evidence through interviews with key stakeholders, observations of classrooms, and a review of various school documents. The team conducted focus groups with school leaders, board members, classroom teachers, families, and 28 students. The team observed instruction in 14 classrooms and reviewed various school documents.

Team Reviewer: Mary McCool Berry, *Educational Consultant*

Team Reviewer: Toni Cross, *Educational Consultant*

Team Reviewer: Meagan Coggins, *CMSD*

Rated Quality Standards

Quality Standard 1: The Quality of Instructional Practices (Classroom Climate) – meets expectations (1.5)

Quality Standard 2: The Quality of Instructional (Purposeful Teaching) – meets expectations (1.5)

Quality Standard 3: The Quality of Students’ Supports – approaches expectations (1.0)

Quality Standard 4: The Quality of Educators’ Supports – meets expectations (1.5)

Quality Standard 5: The Quality of School Leadership and Management – meets expectations (1.5)

Overall Renewal Site Visit Score: 7/10

Strengths

The school reflects a safe and trustworthy professional climate. Teachers consistently described positive relationships with each other and an environment in which they can readily seek and receive support. Teachers frequently reported how their colleagues support them, such as offering suggestions to develop a classroom culture or being supportive of each other personally. Teachers also frequently expressed feeling appreciated and supported by school leaders. Teachers reported that they feel comfortable approaching school leaders for feedback, and that the feedback provided by the principal was frequently helpful in developing their instructional practice.

Classroom interactions are cooperative and conducive to learning. The site visit team observed classroom norms and routines implemented across classrooms. In many of these classrooms, these routines support students’ sharing of their learning and understandings. Site visit team members also observed teachers’ responsiveness to student’s nonacademic needs, e.g., in several classrooms, there was an opportunity for students to take a break or to engage with the teacher around social and emotional learning.

Opportunities for Growth

The school does not have a coherent, comprehensive, and aligned English Language Arts (ELA) curriculum. The instructional materials for Kindergarten, Grade 1, and Grade 2 of Units of Study (Lucy Calkins & TCRWP Colleagues) do not meet curriculum expectations and are not in alignment with the science of reading. The texts included in the materials are not appropriately complex for the grade level and do not build in complexity over the course of the year. Materials do not include questions and tasks aligned to grade-level standards, but rather focus on strategy instruction. Additionally, materials rely on cueing, including meaning, syntax, and visual cues to teach reading skills. Foundational skills instruction lacks a cohesive and intentional scope and sequence for systematic and explicit instruction in phonological awareness and phonics. The program also lacks a research-based rationale for the order of phonological awareness and phonics instruction.

A culture of diversity, equity, and inclusion (DEI) is informally emerging at the school. School staff shared various interpretations of how they value diversity, equity, and inclusion. Some teachers shared that DEI was not an issue because kindness is a value of the school, while others mentioned everyone is accepted for who they are. Leaders and teachers both discussed the importance of using multicultural reading materials that reflect student backgrounds. Leaders also discussed the importance of unpacking biases; however, teachers did not share this or identify related professional learning opportunities that have taken place in this academic year. A few teachers noted a network-level training that took place before 2021, but when asked, teachers could not name any structures that they have consistently implemented because of the training. Additionally, school staff were not able to name targeted practices designed to improve outcomes when looking at data for different subgroups. Pushing for a shared understanding of diversity, equity, and inclusion – and then implementing policies to formalize beliefs that are informally shared across stakeholders at the school is an area of opportunity to leverage.

Quality Standard 1: Instructional Practices (Classroom Climate)

In this quality standard the school the school **meets expectations**

The main strengths within this standard:

- The classroom environment is responsive and respectful. When observing instruction, the site visit team noticed that many classrooms had behavior expectations that were understood by most students; in these classrooms behavior did not interrupt instruction or teacher redirection was effective when addressing minor misbehaviors.
- In some classrooms, teachers implemented strategies for students' cognitive engagement, such as having students explain their work to a partner or class, giving students opportunities to lead a partnered assignment, or having students justify their thinking when formatively assessed.

The most significant areas of opportunity within this standard:

- Learning time was not consistently maximized across classrooms, in some rooms students were engaged in only a portion of the academic tasks in each lesson and would spend other time disengaged working on a non-academic task or walking around the classroom. In some instances, teachers successfully redirected or used a buddy room, in other instances, students lost significant learning time.

Improvement strategies that could be considered:

- Ensure all teachers can access the consistent feedback cycle for coaches to observe all classes with an identified need and collect evidence of learning within lessons; differentiate PD or provide extra teacher opt-in workshops around learning time OR an identified area of need.

Quality Standard 2: Instructional Practices (Purposeful Teaching)

In this quality standard the school **meets expectations**.

The main strengths within this standard:

- Students engage in academic discourse when working in groups, with a partner, or 1:1 with the teacher. In many classrooms, students explain the task they are working on and how they got to the answer.

The most significant areas of opportunity within this standard:

- During whole group activities, there was less opportunity for students to engage in learning for the duration of the lesson. For example, in some classes one student answered the question and had a dialogue with the instructor while the other students listened passively or began to take their focus off of the teacher; not all students were redirected back into learning.
- Checks for understanding and formative assessments were inconsistently implemented across classrooms.

Improvement strategies that could be considered:

See Quality Standard 1

Quality Standard 3: Students' Supports

In this quality standard the school **meets expectations**.

The main strength within this standard:

- The school provides a safe environment to support students' learning. Leaders, teachers, and families all reported that the school is a safe place for teaching and learning. Leaders and teachers explained the systems that are in place for physical safety including a secure building, clear dismissal procedures, and adults who prioritize student wellbeing. In addition, leaders and teachers noted that the entire staff is trained in the responsive classroom model and that there are consistent behavioral expectations across the school. Moreover, teachers and leaders reported a heavy focus across the school on social-emotional learning (SEL). To this end, teachers and leaders explained that the school has a counselor who runs a social and emotional learning block for all grades to participate in on a rotating four-week cycle.
- School staff employ strategies to ensure effective communication and collaboration with all students' families. When asked, all families reported they were able to get in contact with the school via the openness of school leaders or directly with their student's teacher(s). Families mentioned the use of Bloomz or Powerschool as a method of effective communication with the school.

The most significant areas of opportunity within this standard:

- DEI is not yet embedded in policy or systems at the school or network level, there is a vested interest from school staff, to leverage these mindsets to create concrete policies and shared understandings of equity and inclusion would push the work forward.

Improvement strategies that could be considered:

- While on-site administration has created a culture of safety, kind candidness, and learning for staff, there is a schism of communication between staff and network-level admin. Experiences are not consistent, and teacher voice could be better leveraged in the development of quality professional development experiences.

Quality Standard 4: Educators' Supports

In this quality standard the school **meets expectations.**

The main strengths within this standard:

- Professional Development (PD) and community involvement is aligned to network goals including returning back to cluster and multi-age education. Teachers and leaders noted community meetings visits to other IG schools, sophomore service from a neighboring high school, and middle school students assisting with lunch and other moments of the school day for the elementary school students. The PD scope and sequence is aligned to network priorities.

The most significant areas of opportunity within this standard:

- PD does not intently include instruction; teacher feedback on PD is not applied at the network level and all teachers do not consider PD as helpful in improving their instructional practice. Teachers reported that many PDs are in response to issues that are not relevant to their school or is not differentiated for teachers who are not new to the field.
- Building coaches are not as available or present for coaching at the school, some teachers looking for more direct instructional coaching, and though there is a system, they do not always have access to it.

Improvement strategies that could be considered:

- Network-level coaching to be more widely and consistently available to teaching staff who request it.
- Include teacher voice and feedback in network-level professional development, specifically around curriculum and instruction.
- Conduct a needs assessment for teaching and learning that identifies key teaching and planning skills and design a tiered approach to adult learning within the school/network that allows teachers to scaffold their own learning, collaborate with colleagues, plan vertically, and observe model teachers.

Quality Standard 5: School Leadership and Management

In this quality standard the school **meets expectations.**

The main strengths within this standard:

- School leaders regularly observe the quality of instruction and provide regular, meaningful, and timely feedback that teachers report has helped to improve their instructional practice.
- School leaders promote a collaborative learning structure where teachers are able to collaborate with others and leverage their personal expertise to improve the school. For example, teachers have the opportunity to lead some elements of school-based PD.

The most significant areas of opportunity within this standard:

- The ELA curriculum is not aligned with state standards. See Page 1, Opportunities for Growth.
- The integration of science and social studies into the core curriculum is absent in grades K-4.

Improvement strategies that could be considered:

- The addition of an ELA curriculum that aligns with state standards and the science of reading expectations.
- The addition of social studies and science to the elementary level students would be within the mission of the institution to provide scholars with academic skills to excel at learning and citizenship and be prepared to enter high school with a well-rounded foundation.



Charter School Site Visit Report

Name of school: Lakeshore Intergenerational School

Date of visit: 9/7/23, 9/14/23

Sponsor representatives present: Meagan Coggins (Manager, School Quality Review), Lauren Neumann (Special Education Program Manager), Matt Rado (Executive Director, Charter Schools), Megan Traum (Executive Director, School Quality Review), Lesley Wilkins-Valentine (Director, Charter Schools)

School representatives present: Sarah Alonso (Network Operations Director), Curtis Walker (Principal)

Current overall compliance score: 29/29

(includes all compliance items collected through the date of the site visit)

A. Background

As a charter school sponsor, CMSD is legally and contractually obligated to monitor and evaluate the charter school's compliance with all applicable law and rule. Pursuant to state law, sponsors must conduct comprehensive site visits of each sponsored school while class is in session at least twice a year.¹ Sponsors must also make written reports of information obtained during site visits and provide these to the Ohio Department of Education upon request.

The purpose of these visits is to verify contractual, federal, state, and local compliance in a variety of areas, including health and safety, the educational program (including provision of student learning opportunities), state-required assessments, fiscal operations, governance and administration, and other assessment and accountability measures as defined in the charter contract. The comprehensive site visits help inform the performance of the school according to the Organizational Performance Framework, which is part of the charter contract.

CMSD's comprehensive site visit protocol meets the criteria for exemplary sponsors as defined in the Ohio Department of Education's Quality Practice Rubric.² Exemplary sponsors collect data from a variety of school employees and other stakeholders, such as board members, students, parents, and management company staff, during site visits.

Exemplary sponsors also provide written reports following each site visit that details the information collected during the site visit, summarizes the findings, and notes areas of improvement and strength.

¹ See <http://codes.ohio.gov/oac/3301-102-04>

² See 2023-24 sponsor evaluation rubric here: <https://education.ohio.gov/Topics/Community-Schools/Sponsor-Ratings-and-Tools/2023-2024-Sponsor-Evaluation-Tools>

B. Summary of Visit

During the fall 2023 Lakeshore Intergenerational School site visit CMSD staff performed an audit of special education files; checked school compliance to date; conducted a building walkthrough; and observed classroom instruction. More specific information about these areas can be found later in this report.

C. Areas of Strength

CMSD staff identified a number of strengths of the school during the visit. These include:

- No compliance issues were identified during the building walkthrough or Epicenter compliance collection through the date of the visit.
- In some classrooms there were clear behavioral expectations. In these classrooms, there was respect between students and adults, in some instances.

D. Growth and/or Improvement Areas

CMSD staff also identified a number of areas for growth and/or improvement during the visit:

- The site visit team observed limited instruction that was intentional, engaging, and challenging for all students.
- In many classrooms, the site visit team did not observe instruction that prompted students to critically think, justify their thinking, or apply what they learned to the real world.
- In many classrooms there was an absence of assessment, but some teachers provided meaningful feedback to students.

E. Information Collected

1. State of the School

Most recent state report card and sponsor accountability ratings

School Name	Overall	Achievement	Progress	Gap Closing	Early Literacy	Gap Closing Buckets	Chronic Absenteeism
Lakeshore Intergenerational School	2 Stars	2 Stars-Meets on Peer Comparison	2 Stars	1 Star	1 Star	Falls Far Below	Does Not Meet

Green=met sponsor standards. Red=did not meet sponsor standards.

2. Classroom Observations (see attached)

3. Special Education File Audit (see attached)

4. Compliance Review

Matt Rado reviewed the school's Epicenter submissions to that point and ensured that all submissions were correct.

Per the organizational framework, all items for the site visit must be turned in for the school to receive credit. Please see the attached framework scoring document for a full review of the school's score.

5. Walkthrough (see attached)

F. Organizational Framework scoring sheet

Overview

The purpose of the Organizational Performance Framework is to establish and communicate the compliance-related standards by which CMSD will monitor and evaluate its sponsored schools. The items included in the framework come from Ohio Department of Education (ODE) requirements, contract requirements, and state law. When a number is listed in the Item column, it refers to the number from ODE's School Compliance worksheet, available online and updated annually. CMSD staff consulted with all of its sponsored schools to prioritize and organize these items. Items are weighted according to their importance and are organized into nine categories: Access and Student Rights, Health and Safety, Human Capital, Governance, Admissions, Educational Program, Fiscal, Site Visit, and Other.

CMSD aims to maximize school operational autonomy by articulating the base set of state and federal laws, rules, regulations, and contractual obligations that apply to its sponsored schools.

CMSD will primarily use Epicenter to track compliance. Items not submitted by Epicenter deadlines will result in lost points for those items. Policies/compliance items will be reviewed on due dates.

Some compliance-related requirements cannot be assessed via Epicenter. CMSD will also conduct fall and spring site visits, as required by law. CMSD will provide schools with advance notice of site visits. Please review the CMSD Comprehensive Site Visits: Purpose and Protocol document for detailed information on site visits. The bulk of Epicenter due dates are aligned with the fall and spring site visits. For example, CMSD will review all special education policies in the fall and all admission policies in the spring.

To be considered for contract renewal, a school will be expected to have no outstanding notices of breach or concern. A notice is outstanding if the school has failed to submit a remedial action plan that has been approved by CMSD.

Scoring

100 points possible

Exceeds Expectations: 90 to 100 points

Meets Expectations: 80 to 89 points

Does Not Meet Expectations: Below 80 points

1. Access and Student Rights (18 points possible)

1A) Subcategory: Special Education (13)

Item	Description	Points possible
171, 172, 174, 175, 176, 178	Written policies for special education as required by Ohio Revised Code: <ul style="list-style-type: none"> • Provision of services (171) • Individualized Education Program (IEP) development and implementation (172) • Confidentiality (174) • Identification and evaluation of homeless students with disabilities (175) • Free appropriate public education (176) • Ensuring compliance with IDEIA (178). 	6/6
172	IEPs implemented as written. FALL SITE VISIT	2/2
173	Standards/procedures for identification and evaluation of students with disabilities consistent with federal and state law. FALL SITE VISIT	2/2
177	Services delivered in the least restrictive environment while also allowing for a continuum of services. FALL SITE VISIT	2/2
182	School submitted plan to ODE for serving students with disabilities. END OF YEAR COLLECTION (CERTIFICATION ONLY)	1

1B) Subcategory: Student Rights (3)

Item	Description	Points possible
405 and 406	School provides due process for students suspended, expelled, removed AND school follows the policy. END OF YEAR COLLECTION (POLICY, BOARD APPROVAL, EVIDENCE OF DUE PROCESS, ANNUAL SUSPENSIONS REPORT)	2

901	School has adopted policy on Positive Behavioral Intervention and Supports that complies with Ohio requirements. END OF YEAR COLLECTION (POLICY, EVIDENCE POSTED ON WEBSITE, EVIDENCE OF ANNUAL NOTIFICATION IN ADDITION TO WEBSITE POSTING)	1
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1C) Subcategory: Access

Item	Description	Points possible
432	School will achieve racial and ethnic balance reflective of community it serves. END OF YEAR COLLECTION (EVIDENCE BOARD REVIEWED DATA AND DISCUSSED)	2

2. Health and Safety (14 points possible)

2A) Subcategory: Food safety (3)

Item	Description	Points
705	School has adopted a policy to protect students with peanut or other food allergies. END OF YEAR COLLECTION (POLICY AND BOARD APPROVAL)	1
778	School ensures that at least one employee is present during food service who is trained in the Heimlich maneuver.	2/2

2B) Subcategory: Facilities (5)

Item	Description	Points possible
752	School does not apply lead-based paint and complies with all orders and requirements for inspection, maintenance, and prevention of lead-based poisoning. END OF YEAR COLLECTION (CERTIFICATION ONLY)	2
759	School timely submitted an emergency management plan in the form required by ODE and the plan was approved.	1/1

Safety drills	School held all of its required rapid safety and dismissal drills, including tornado drills, in appropriate months and a drill within first 10 days of school. DRILL LOGS DUE MONTHLY IN EPICENTER-REVIEW IN TOTALITY AT END OF YEAR	2
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2C) Subcategory: Student wellness (6)

Item	Description	Points possible
703	School has screened pupils enrolled in either kindergarten or first grade prior to Nov. 1 for hearing, vision, speech and communications, or medical problems and developmental disorders AND notified parents of the screening before August 1.	2
706	School has adopted policies and procedures regarding child abuse reporting and training of all staff and volunteers as to their obligation to report and consequences for failure to do so. Requires policy and training records. END OF YEAR COLLECTION (POLICY AND TRAINING	2
755	School’s governing authority reviewed policies and procedures to ensure safety of students, employees and other persons using a school building from any known hazards in the building or on building grounds that pose an immediate risk to health or safety. END OF YEAR COLLECTION (BOARD MINUTES SHOWING POLICIES REVIEWED)	1
761	School adopted required policy prohibiting harassment, intimidation, and bullying. END OF YEAR COLLECTION (POLICY AND EVIDENCE OF BOARD APPROVAL)	1

3. Human Capital (12 points possible)

3A) Subcategory: Licensure/Professional

Item	Description	Points possible
118	School sees that students on reading monitoring improvement plans (applies to grades 3 and 4 only) are taught by teachers with the appropriate license, endorsements, and/or qualifications. END OF YEAR COLLECTION (CERTIFICATION ONLY)	1

603	School will suspend a person from all duties that require the care, custody, or control of a child during the pendency of the criminal action against the person-applicable when an employee was subject to criminal action. END OF YEAR COLLECTION (CERTIFICATION ONLY)	1
611	School has a local professional development committee to determine coursework and other professional development needed by licensed educators to satisfy the renewal of such licenses. END OF YEAR COLLECTION (MEETING CALENDAR AND	1
607 and 612	All school teachers, aides, and providers are properly licensed by the State Board of Education.	2/2
Teacher retention	School has submitted annual reports on staff and teacher turnover, if requested by sponsor.	2

3B) Subcategory: Background checks

Item	Description	Points possible
622, 623, 624, 625, 626	School has done all required criminal background checks.	5/5

4. Governance (14 points possible)

Item	Description	Points possible
655	School has posted on its website the names of school's governing authority and provides, upon request, the name and address of each member of the governing authority to the sponsor and ODE. END OF YEAR COLLECTION (WEBSITE SCREENSHOT); SITE VISITS-REVIEW POSTING IN PERSON	1
664	School's meetings of its governing authority are public meetings, provide public advance notice, and follow all laws with respect to proper public meeting protocol. END OF YEAR COLLECTION (WEBSITE SCREENSHOT); SITE VISITS- REVIEW POSTING IN PERSON	3
667	School's governing authority members, fiscal officer, administrators and supervisory staff are annually trained on the public records and open meetings laws. END OF YEAR COLLECTION (CERTIFICATES FOR APPLICABLE STAFF)	1

316/668	School fills public records requests in a timely manner, and at least one person, as designated by school, has attended training approved by the Ohio attorney general about school's obligations pertaining to public records. END OF YEAR COLLECTION (COPIES OF POLICES)	3
658	Governing authority members have no interest in public contracts or other unaddressed ethical conflicts of interest, etc.	1/1
659	No member of governing authority also serves on a district board of education.	1/1
661	School uses independent counsel when required. END OF YEAR COLLECTION (CERTIFICATION ONLY)	1
662	School has submitted current and complete Comprehensive Plan, or verified that sponsor has it on file; has submitted all policies and procedures on internal financial controls; and has adhered to Comprehensive Plan and these policies and procedures and ensured compliance by any contractor.	3

5. Admissions, Enrollment, and Attendance (8 points possible)

Item	Description	Points possible
401	School provides parents with the proper notice of truancy, utilizes an intervention strategy, and/or files a complaint in juvenile court when appropriate for students that are truant. School's governing authority has adopted policy regarding habitual truancy and intervention strategies. END OF YEAR COLLECTION (POLICY AND EVIDENCE OF BOARD APPROVAL)	2
426	School has admission procedures that specify the items outlined in ORC 3314.06. END OF YEAR COLLECTION	2
427	School has an admission policy that addresses students residing outside the district of residence. END OF YEAR COLLECTION	1
429	School maintains complete and accurate reporting of student enrollment data used to calculate payments, and school's borrowing and expenditures are consistent with legal requirements. END OF YEAR COLLECTION (CERTIFICATION ONLY)	1
436	School provides parents or guardians with a copy of the most recent Ohio state report card during the admissions process. SITE VISITS AND END OF YEAR COLLECTION (DIGITAL COPY OF PACKET WITH REPORT CARD)	1
Lottery	If required by ORC 3314.06, and subject to any preferences allowed under that provision, school has selected students for admission using a random lottery.	1

6. Education Program (10 points possible)

Item	Description	Points possible
101	School provides at least 920 hours of learning opportunities to at least 25 students. END OF YEAR COLLECTION (CERTIFICATION) AND CALENDAR REVIEW (OPENING ASSURANCES)	1
105	School has adopted a policy, updated annually, governing academic prevention and intervention services covering requirements of law, which include but are not limited to measuring student progress, identifying students not attaining proficiency thresholds, collect and using student performance data, and provision of prevention/intervention services. END OF YEAR COLLECTION (POLICY AND EVIDENCE OF BOARD APPROVAL)	1
116	School promotes students to fourth grade when all criteria outlined in ORC 3313.608 are met. END OF YEAR COLLECTION (CERTIFICATION ONLY)	1
117	School continues any required intervention services for students not promoted to 4th grade, consistent with the requirements of ORC 3313.608. END OF YEAR COLLECTION (CERTIFICATION ONLY)	1
217	School provides intervention services to students not meeting certain proficiency level. END OF YEAR COLLECTION (CERTIFICATION ONLY)	2
220	School administers state diagnostic tests to students in required categories and to all students in the appropriate grade level at least once annually, providing the information to parents and ODE.	1
309	School administers all required assessments and submits all data required to calculate the report card to ODE. ASSESSMENTS PLAN AND CALENDAR, END OF YEAR COLLECTION (CERTIFICATION)	1
902	School has adopted a grade promotion and retention policy that prohibits the promotion of a student to the next grade level if the student has been truant for more than 10% of the required attendance days of the current school year and failed two or more of the required curriculum subject areas, unless the student's principal and teachers of any failed subject areas agree the student is academically prepared for the next grade level. END OF YEAR COLLECTION (POLICY AND EVIDENCE OF BOARD APPROVAL)	1

7. Fiscal (7 points possible)

Item	Description	Points possible
308	School follows all guidelines and timely submitted complete and accurate EMIS data, using a software package certified by ODE. Each fiscal officer appointed under ORC 3314.011 is responsible for annually reporting the community school's data under ORC 3301.0714.	1
502	School that receives funding under Title I maintains the required level of expenditures on an annual basis as outlined in federal regulations.	1
503	School reports all financial information in an easily understood format and by the reporting categories and subgroups required by ODE. END OF YEAR COLLECTION (CERTIFICATION ONLY)	1
504	Annually, school provides a financial plan detailing an estimated budget and the per pupil expenditures.	1
506	School has filed annual financial reports with the Auditor of State that are prepared using generally accepted accounting principles.	1
509	School has liability insurance sufficient to cover any risks to the school.	1/1
Audit	Audit of school is devoid of significant findings and conditions, material weaknesses, or significant internal control weaknesses; no ongoing concerns. REVIEW AFTER AUDIT	1

8. Site Visit (8 points possible)

Item	Description	Points
Fall Site Visit	On its Fall Comprehensive Site Visit, school cooperates with observations/focus groups; does not require a return site visit on special education; does not require a follow-up enrollment record review; and has fewer than three items of concern on its walkthrough.	4/4
Spring Site Visit	On its Spring Comprehensive Site Visit, school cooperates with observations/focus groups; does not require a return site visit on special education; does not requires a follow-up enrollment record review; and has fewer than three items of concern on its walkthrough.	4

9. Other (9 points possible)

Other ODE requirements	<p>School complies with any items included in latest annually updated ODE School Compliance worksheet, available online at http://education.ohio.gov/Topics/Community-Schools, but not listed elsewhere in this Organizational Performance Framework.</p> <p>OTHER SPECIFIC ITEMS WE WILL COLLECT THIS YEAR WERE DISCUSSED AT THE COMPLIANCE MEETING AND SHARED IN THE ASSOCIATED SPREADSHEET. PLEASE REVIEW EPICENTER FOR SPECIFIC ITEMS.</p>	5
Corrective Action Plans	School has not had to develop and implement a corrective action plan (refers to sponsor evaluation corrective actions).	2
Intervention Protocol	School has never required sponsor intervention under the Intervention Protocol.	2

About the Sponsor Fall Site Visit Instructional Walkthroughs:

School: Lakeshore Intergenerational School

The purpose of the classroom observations is to ensure the school is implementing the material terms of its education program. CMSD will visit most classrooms across a range of subject areas and grade levels in a school for 15-20 minutes each. CMSD will document the classroom visits on the CMSD Charter Sponsor Observation Tool. CMSD will not provide feedback to individual teachers, or report on individual teachers to school administration. The debrief and report can be used by school leadership as a qualitative data point when considering all-staff professional development and other supports for teachers. The classroom observations are designed to be formative and non-evaluative.

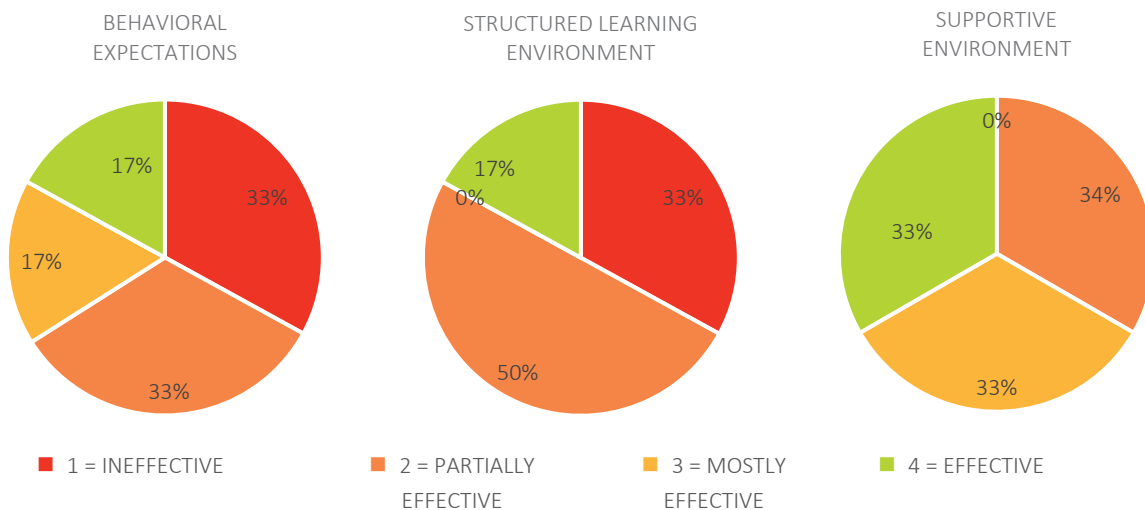
Helpful notes for building leaders:

- Observers do not look at lesson plans; however, this does not mean that we do not value lesson planning. Because our system captures real-time instructional data, we rate what we observe being implemented in the classroom rather than what plans indicate should be implemented.
- During a site visit, the instructional walk throughs **are not designed as a teacher evaluation system**, and we recommend that it is not used as such. Robust teacher evaluation systems include additional aspects such as lesson and curriculum planning, professional responsibilities, and student data. The instructional walkthrough functions as a complement to evaluation systems in that it provides detailed trend data that can inform coaching and professional development support, as well as reveal areas of strength and improvement across time.

Domain 1: Instruction

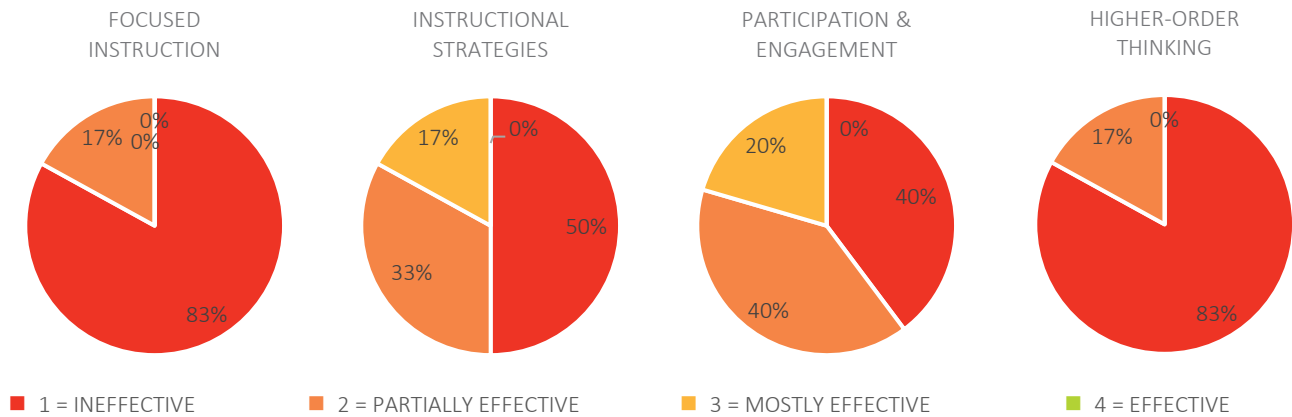
Do classroom interactions and organization ensure a classroom climate conducive to learning for all students?

Classroom Climate



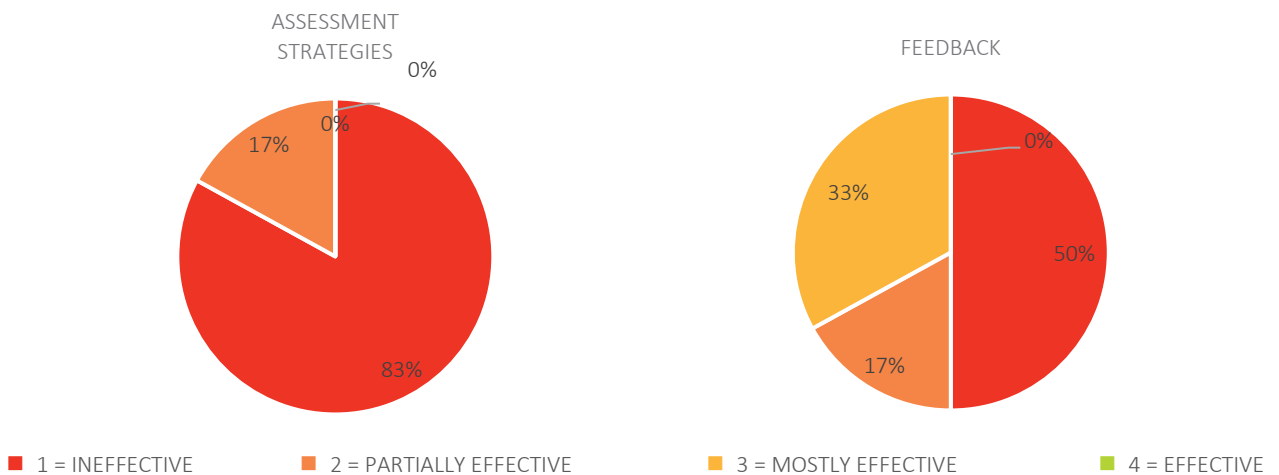
Is instruction intentional, engaging, and challenging for all students?

Purposeful Teaching



Do teachers regularly assess students' progress toward mastery of key skills and concepts, and do they utilize assessment data to provide feedback to students during the lesson?

In-Class Assessment & Feedback



Summary of Instructional Observations

The classroom climate includes the most evidence around effective classrooms. In some classrooms there were clear behavioral expectations, for example, the teacher referenced a set of rules or expectations or asked students to recall behavior expectations; a structured learning environment; or evidence of a supportive and responsive classroom for some students. In these classrooms, there was respect between students and adults, in some instances. In other classrooms there was a lack of clear behavior expectations and student behaviors were not effectively managed or disrupted throughout the lesson and interfered with learning. The site visit team observed limited instruction that was intentional, engaging, and challenging for all students. The indicators in this classroom bucket are an area of opportunity to leverage to provide aligned, cognitively engaging, and rigorous instruction. In many classrooms, the site visit team did not observe instruction that prompted students to critically think, justify their thinking, or apply what they learned to the real world. Lastly, in many classrooms there was an absence of assessment, but some teachers provided meaningful feedback to students.

Summary of In-Person Classroom Observation Data

During the site visit, the team conducted six in-person observations, representing a range of grade levels and subject areas. The following tables present the compiled data from those observations. *Note: Due to rounding, the percentages for a particular indicator may not appear to total to 100%.*

	Indicator	Distribution of Scores % Ineffective (1) → % Effective (4)			
		1	2	3	4
Classroom Climate	1. Behavioral Expectations Clear expectations Consistent rewards and/or consequences Anticipation and redirection of misbehavior	33%	33%	17%	17%
	2. Structured Learning Environment Teacher preparation Learning time maximized	33%	50%	0%	17%
	3. Supportive Environment Caring relationships Teacher responsiveness to students' non-academic needs	0%	33%	33%	33%
Purposeful Teaching	4. Focused Instruction Learning objectives Effective communication of academic content High expectations	83%	17%	0%	0%
	5. Instructional Strategies Multi-sensory modalities and materials Instructional Format Student choice	50%	33%	17%	0%
	6. Participation and Engagement Active student participation Perseverance	33%	33%	17%	17%
	7. Higher-order Thinking Challenging tasks Application to new problems and situations Justify thinking or reasoning	83%	17%	0%	0%
In-Class Assessment & Feedback	8. Assessment Strategies Use of formative assessments Alignment to academic content	83%	17%	0%	0%
	9. Feedback Feedback to students Student use of feedback	50%	17%	33%	0%

Site Visit Team Members

The site visit to Lakeshore Intergenerational School was conducted on September 14, 2023 by a team of educators from the Cleveland Metropolitan School District.

- Meagan Coggins, Manager of School Quality, Cleveland Metropolitan School District
- Megan Traum, Executive Director of School Quality, Cleveland Metropolitan School District
- Lesley Wilkins-Valentine, Director of Charter Schools, Cleveland Metropolitan School District

CMSD Site Visit Building Walkthrough

School: Lakeshore Intergenerational School

Date: 9/7/2023

CMSD Staff Member: Matt Rado

Building and grounds	Yes	No	Somewhat	N/A	Notes
1. Name of school is outside building.	X				
2. Walkways to school entrances are cleared of snow, ice, and other potential hazards.	X				
3. The office is easy to find.	X				
4. Classrooms appear clean.	X				
5. Classroom furniture (desks, chairs) appear to be in good working order and are relatively clean.	X				
6. Bathrooms are clean and have needed supplies.	X				
7. Hallways are clean and create an inviting environment (through student work, posters, etc.).	X				
8. Floors throughout building are clean and not slippery.	X				
9. Stairwells appear safe (e.g., they have handrails, lighting is sufficient, etc.).	X				
10. Play areas are cleared of debris and any playground equipment is in good order.				X	

Culture	Yes	No	Somewhat	N/A	Notes
1. The school’s mission is apparent throughout the school building and through interactions with staff and students.	X				
2. The school environment seems calm and safe.	X				
3. Interactions between students and teachers seem respectful.	X				
4. Visitors are welcome and treated with respect.	X				

Other Compliance	Yes	No	Somewhat	N/A	Notes
1. Verify that the National Flag, which is not less than five feet in length, is displayed over, near, or within the school. (R.C. 3313.80, ODE Item 957)	X				
2. If a copy of the official motto of the U.S. or Ohio has been donated, ensure it has been accepted and is displayed in accordance with law. (R.C. 3313.801, ODE Item 958)				X	
3. Verify that information about Governing Authority members and meetings is posted and current. (Charter Contract, R.C. 121.22)	X				
4. Verify that the Worker’s Compensation Certificate is posted and current. (R.C. 4123, ODE Item 153)	X				
5. Verify that the public records policy is displayed and that a records custodian has been designated. ((R.C. 149.43 (E) (2))	X				
6. Review permission forms for medication, including EpiPens and inhalers, and review storage of medication. (R.C. 3313.716, 3313.718, ODE Items 211-212)	X				No medicine onsite

Other Compliance, Ctd.	Yes	No	Somewhat	N/A	Notes
7. Review care plan for students with diabetes. Check for physician letters with instructions and ensure that not later than 14 days after receipt of an order, the school informs parent or guardian that student might be entitled to a 504 Plan. Also ensure that the school is tracking the number of students with diabetes and the number of errors associated with medication administration. (R.C. 3313.7112, ODE Item 213)	X				
8. Report card verification. Pursuant to Ohio law, schools must provide parents or guardians with a copy of the most recent record card during the admissions process. CMSD staff will check the enrollment package during the site visit to verify. (R.C. 3313.6411, ODE Item 436)				X	No paper enrollment
9. Verify that the Public Employment Risk Reduction Program (PERRP) poster is displayed. ((R.C.3314.03(A)(11)(d))	X				
10. The school's attendance and participation policies are available for public inspection. ((R.C. 3314.03(A)(27))	X				
11. Verify that the school's policy regarding suspension, expulsion, removal, and permanent exclusion is posted in a central location. (R.C. 3313.661)	X				
12. If the school had any students absent without legitimate excuse on the day of the site visit the school made an attempt, within two hours of the start of the school day, to contact the student's parent, guardian or caregiver. (R.C. 3321.141)	X				

Notes:



Charter School Site Visit Report

Name of school: Near West Intergenerational School

Date of visit: 11/6/23, 11/13/23

Sponsor representatives present: Meagan Coggins (Manager, School Quality Review), Lauren Neumann (Special Education Program Manager), Matt Rado (Executive Director, Charter Schools), Lesley Wilkins-Valentine (Director, Charter Schools)

School representatives present: Sarah Alonso (Network Operations Director), April Maimone (Principal)

Current overall compliance score: 29/29

(includes all compliance items collected through the date of the site visit)

A. Background

As a charter school sponsor, CMSD is legally and contractually obligated to monitor and evaluate the charter school's compliance with all applicable law and rule. Pursuant to state law, sponsors must conduct comprehensive site visits of each sponsored school while class is in session at least twice a year.¹ Sponsors must also make written reports of information obtained during site visits and provide these to the Ohio Department of Education upon request.

The purpose of these visits is to verify contractual, federal, state, and local compliance in a variety of areas, including health and safety, the educational program (including provision of student learning opportunities), state-required assessments, fiscal operations, governance and administration, and other assessment and accountability measures as defined in the charter contract. The comprehensive site visits help inform the performance of the school according to the Organizational Performance Framework, which is part of the charter contract.

CMSD's comprehensive site visit protocol meets the criteria for exemplary sponsors as defined in the Ohio Department of Education's Quality Practice Rubric.² Exemplary sponsors collect data from a variety of school employees and other stakeholders, such as board members, students, parents, and management company staff, during site visits.

Exemplary sponsors also provide written reports following each site visit that details the information collected during the site visit, summarizes the findings, and notes areas of improvement and strength.

¹ See <http://codes.ohio.gov/oac/3301-102-04>

² See 2023-24 sponsor evaluation rubric here: <https://education.ohio.gov/Topics/Community-Schools/Sponsor-Ratings-and-Tools/2023-2024-Sponsor-Evaluation-Tools>

B. Summary of Visit

During the fall 2023 Near West Intergenerational School site visit CMSD staff performed an audit of special education files; checked school compliance to date; conducted a building walkthrough; observed classroom instruction; and interviewed stakeholders. More specific information about these areas can be found later in this report.

Since this school is currently undergoing the renewal process, typical fall classroom observations were conducted by a group of three staff consisting of two outside consultants managed by a CMSD staff member. Please review the separate renewal report for more information.

C. Areas of Strength

CMSD staff identified a number of strengths of the school during the visit. These include:

- No compliance issues were identified during the building walkthrough or Epicenter compliance collection through the date of the visit.
- Please review the separate renewal site visit report for this school.

D. Growth and/or Improvement Areas

CMSD staff also identified a number of areas for growth and/or improvement during the visit:

- Please review the separate renewal site visit report for this school.

E. Information Collected

1. State of the School

Most recent state report card and sponsor accountability ratings

School Name	Overall	Achievement	Progress	Gap Closing	Early Literacy	Gap Closing Buckets	Chronic Absenteeism
Near West Intergenerational School	4 Stars	3 Stars	4 Stars	4 Stars	3 Stars	Exceeds	Meets

Green=met sponsor standards. Red=did not meet sponsor standards.

2. Classroom Observations (see attached)

3. Special Education File Audit (see attached)

4. Compliance Review

Matt Rado reviewed the school's Epicenter submissions to that point and ensured that all submissions were correct.

Per the organizational framework, all items for the site visit must be turned in for the school to receive credit. Please see the attached framework scoring document for a full review of the school's score.

5. Walkthrough (see attached)

F. Organizational Framework scoring sheet

Overview

The purpose of the Organizational Performance Framework is to establish and communicate the compliance-related standards by which CMSD will monitor and evaluate its sponsored schools. The items included in the framework come from Ohio Department of Education (ODE) requirements, contract requirements, and state law. When a number is listed in the Item column, it refers to the number from ODE's School Compliance worksheet, available online and updated annually. CMSD staff consulted with all of its sponsored schools to prioritize and organize these items. Items are weighted according to their importance and are organized into nine categories: Access and Student Rights, Health and Safety, Human Capital, Governance, Admissions, Educational Program, Fiscal, Site Visit, and Other.

CMSD aims to maximize school operational autonomy by articulating the base set of state and federal laws, rules, regulations, and contractual obligations that apply to its sponsored schools.

CMSD will primarily use Epicenter to track compliance. Items not submitted by Epicenter deadlines will result in lost points for those items. Policies/compliance items will be reviewed on due dates.

Some compliance-related requirements cannot be assessed via Epicenter. CMSD will also conduct fall and spring site visits, as required by law. CMSD will provide schools with advance notice of site visits. Please review the CMSD Comprehensive Site Visits: Purpose and Protocol document for detailed information on site visits. The bulk of Epicenter due dates are aligned with the fall and spring site visits. For example, CMSD will review all special education policies in the fall and all admission policies in the spring.

To be considered for contract renewal, a school will be expected to have no outstanding notices of breach or concern. A notice is outstanding if the school has failed to submit a remedial action plan that has been approved by CMSD.

Scoring

100 points possible

Exceeds Expectations: 90 to 100 points

Meets Expectations: 80 to 89 points

Does Not Meet Expectations: Below 80 points

1. Access and Student Rights (18 points possible)

1A) Subcategory: Special Education (13)

Item	Description	Points possible
171, 172, 174, 175, 176, 178	Written policies for special education as required by Ohio Revised Code: <ul style="list-style-type: none"> • Provision of services (171) • Individualized Education Program (IEP) development and implementation (172) • Confidentiality (174) • Identification and evaluation of homeless students with disabilities (175) • Free appropriate public education (176) • Ensuring compliance with IDEIA (178). 	6/6
172	IEPs implemented as written. FALL SITE VISIT	2/2
173	Standards/procedures for identification and evaluation of students with disabilities consistent with federal and state law. FALL SITE VISIT	2/2
177	Services delivered in the least restrictive environment while also allowing for a continuum of services. FALL SITE VISIT	2/2
182	School submitted plan to ODE for serving students with disabilities. END OF YEAR COLLECTION (CERTIFICATION ONLY)	1

1B) Subcategory: Student Rights (3)

Item	Description	Points possible
405 and 406	School provides due process for students suspended, expelled, removed AND school follows the policy. END OF YEAR COLLECTION (POLICY, BOARD APPROVAL, EVIDENCE OF DUE PROCESS, ANNUAL SUSPENSIONS REPORT)	2
901	School has adopted policy on Positive Behavioral Intervention and Supports that complies with Ohio requirements. END OF YEAR COLLECTION (POLICY, EVIDENCE POSTED ON WEBSITE, EVIDENCE OF ANNUAL NOTIFICATION IN ADDITION TO WEBSITE POSTING)	1

1C) Subcategory: Access

Item	Description	Points possible
432	School will achieve racial and ethnic balance reflective of community it serves. END OF YEAR COLLECTION (EVIDENCE BOARD REVIEWED DATA AND DISCUSSED)	2

2. Health and Safety (14 points possible)

2A) Subcategory: Food safety (3)

Item	Description	Points
705	School has adopted a policy to protect students with peanut or other food allergies. END OF YEAR COLLECTION (POLICY AND BOARD APPROVAL)	1
778	School ensures that at least one employee is present during food service who is trained in the Heimlich maneuver.	2/2

2B) Subcategory: Facilities (5)

Item	Description	Points possible
752	School does not apply lead-based paint and complies with all orders and requirements for inspection, maintenance, and prevention of lead-based poisoning. END OF YEAR COLLECTION (CERTIFICATION ONLY)	2
759	School timely submitted an emergency management plan in the form required by ODE and the plan was approved.	1/1
Safety drills	School held all of its required rapid safety and dismissal drills, including tornado drills, in appropriate months and a drill within first 10 days of school. DRILL LOGS DUE MONTHLY IN EPICENTER-REVIEW IN TOTALITY AT END OF YEAR	2

2C) Subcategory: Student wellness (6)

Item	Description	Points possible
703	School has screened pupils enrolled in either kindergarten or first grade prior to Nov. 1 for hearing, vision, speech and communications, or medical problems and developmental disorders AND notified parents of the screening before August 1.	2
706	School has adopted policies and procedures regarding child abuse reporting and training of all staff and volunteers as to their obligation to report and consequences for failure to do so. Requires policy and training records. END OF YEAR COLLECTION (POLICY AND TRAINING	2
755	School's governing authority reviewed policies and procedures to ensure safety of students, employees and other persons using a school building from any known hazards in the building or on building grounds that pose an immediate risk to health or safety. END OF YEAR COLLECTION (BOARD MINUTES SHOWING POLICIES REVIEWED)	1
761	School adopted required policy prohibiting harassment, intimidation, and bullying. END OF YEAR COLLECTION (POLICY AND EVIDENCE OF BOARD APPROVAL)	1

3. Human Capital (12 points possible)

3A) Subcategory: Licensure/Professional

Item	Description	Points possible
118	School sees that students on reading monitoring improvement plans (applies to grades 3 and 4 only) are taught by teachers with the appropriate license, endorsements, and/or qualifications. END OF YEAR COLLECTION (CERTIFICATION ONLY)	1
603	School will suspend a person from all duties that require the care, custody, or control of a child during the pendency of the criminal action against the person-applicable when an employee was subject to criminal action. END OF YEAR COLLECTION (CERTIFICATION ONLY)	1
611	School has a local professional development committee to determine coursework and other professional development needed by licensed educators to satisfy the renewal of such licenses. END OF YEAR COLLECTION (MEETING CALENDAR AND	1

607 and 612	All school teachers, aides, and providers are properly licensed by the State Board of Education.	2/2
Teacher retention	School has submitted annual reports on staff and teacher turnover, if requested by sponsor.	2

3B) Subcategory: Background checks

Item	Description	Points possible
622, 623, 624, 625, 626	School has done all required criminal background checks.	5/5

4. Governance (14 points possible)

Item	Description	Points possible
655	School has posted on its website the names of school's governing authority and provides, upon request, the name and address of each member of the governing authority to the sponsor and ODE. END OF YEAR COLLECTION (WEBSITE SCREENSHOT); SITE VISITS-REVIEW POSTING IN PERSON	1
664	School's meetings of its governing authority are public meetings, provide public advance notice, and follow all laws with respect to proper public meeting protocol. END OF YEAR COLLECTION (WEBSITE SCREENSHOT); SITE VISITS- REVIEW POSTING IN PERSON	3
667	School's governing authority members, fiscal officer, administrators and supervisory staff are annually trained on the public records and open meetings laws. END OF YEAR COLLECTION (CERTIFICATES FOR APPLICABLE STAFF)	1
316/668	School fills public records requests in a timely manner, and at least one person, as designated by school, has attended training approved by the Ohio attorney general about school's obligations pertaining to public records. END OF YEAR COLLECTION (COPIES OF POLICES)	3
658	Governing authority members have no interest in public contracts or other unaddressed ethical conflicts of interest, etc.	1/1
659	No member of governing authority also serves on a district board of education.	1/1
661	School uses independent counsel when required. END OF YEAR COLLECTION (CERTIFICATION ONLY)	1

662	School has submitted current and complete Comprehensive Plan, or verified that sponsor has it on file; has submitted all policies and procedures on internal financial controls; and has adhered to Comprehensive Plan and these policies and procedures and ensured compliance by any contractor.	3
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5. Admissions, Enrollment, and Attendance (8 points possible)

Item	Description	Points possible
401	School provides parents with the proper notice of truancy, utilizes an intervention strategy, and/or files a complaint in juvenile court when appropriate for students that are truant. School's governing authority has adopted policy regarding habitual truancy and intervention strategies. END OF YEAR COLLECTION (POLICY AND EVIDENCE OF BOARD APPROVAL)	2
426	School has admission procedures that specify the items outlined in ORC 3314.06. END OF YEAR COLLECTION	2
427	School has an admission policy that addresses students residing outside the district of residence. END OF YEAR COLLECTION	1
429	School maintains complete and accurate reporting of student enrollment data used to calculate payments, and school's borrowing and expenditures are consistent with legal requirements. END OF YEAR COLLECTION (CERTIFICATION ONLY)	1
436	School provides parents or guardians with a copy of the most recent Ohio state report card during the admissions process. SITE VISITS AND END OF YEAR COLLECTION (DIGITAL COPY OF PACKET WITH REPORT CARD)	1
Lottery	If required by ORC 3314.06, and subject to any preferences allowed under that provision, school has selected students for admission using a random lottery.	1

6. Education Program (10 points possible)

Item	Description	Points possible
101	School provides at least 920 hours of learning opportunities to at least 25 students. END OF YEAR COLLECTION (CERTIFICATION) AND CALENDAR REVIEW (OPENING ASSURANCES)	1

105	School has adopted a policy, updated annually, governing academic prevention and intervention services covering requirements of law, which include but are not limited to measuring student progress, identifying students not attaining proficiency thresholds, collect and using student performance data, and provision of prevention/intervention services. END OF YEAR COLLECTION (POLICY AND EVIDENCE OF BOARD APPROVAL)	1
116	School promotes students to fourth grade when all criteria outlined in ORC 3313.608 are met. END OF YEAR COLLECTION (CERTIFICATION ONLY)	1
117	School continues any required intervention services for students not promoted to 4th grade, consistent with the requirements of ORC 3313.608. END OF YEAR COLLECTION (CERTIFICATION ONLY)	1
217	School provides intervention services to students not meeting certain proficiency level. END OF YEAR COLLECTION (CERTIFICATION ONLY)	2
220	School administers state diagnostic tests to students in required categories and to all students in the appropriate grade level at least once annually, providing the information to parents and ODE.	1
309	School administers all required assessments and submits all data required to calculate the report card to ODE. ASSESSMENTS PLAN AND CALENDAR, END OF YEAR COLLECTION (CERTIFICATION)	1
902	School has adopted a grade promotion and retention policy that prohibits the promotion of a student to the next grade level if the student has been truant for more than 10% of the required attendance days of the current school year and failed two or more of the required curriculum subject areas, unless the student's principal and teachers of any failed subject areas agree the student is academically prepared for the next grade level. END OF YEAR COLLECTION (POLICY AND EVIDENCE OF BOARD APPROVAL)	1

7. Fiscal (7 points possible)

Item	Description	Points possible
308	School follows all guidelines and timely submitted complete and accurate EMIS data, using a software package certified by ODE. Each fiscal officer appointed under ORC 3314.011 is responsible for annually reporting the community school's data under ORC 3301.0714.	1

502	School that receives funding under Title I maintains the required level of expenditures on an annual basis as outlined in federal regulations.	1
503	School reports all financial information in an easily understood format and by the reporting categories and subgroups required by ODE. END OF YEAR COLLECTION (CERTIFICATION ONLY)	1
504	Annually, school provides a financial plan detailing an estimated budget and the per pupil expenditures.	1
506	School has filed annual financial reports with the Auditor of State that are prepared using generally accepted accounting principles.	1
509	School has liability insurance sufficient to cover any risks to the school.	1/1
Audit	Audit of school is devoid of significant findings and conditions, material weaknesses, or significant internal control weaknesses; no ongoing concerns. REVIEW AFTER AUDIT	1

8. Site Visit (8 points possible)

Item	Description	Points
Fall Site Visit	On its Fall Comprehensive Site Visit, school cooperates with observations/focus groups; does not require a return site visit on special education; does not require a follow-up enrollment record review; and has fewer than three items of concern on its walkthrough.	4/4
Spring Site Visit	On its Spring Comprehensive Site Visit, school cooperates with observations/focus groups; does not require a return site visit on special education; does not requires a follow-up enrollment record review; and has fewer than three items of concern on its walkthrough.	4

9. Other (9 points possible)

Other ODE requirements	<p>School complies with any items included in latest annually updated ODE School Compliance worksheet, available online at http://education.ohio.gov/Topics/Community-Schools, but not listed elsewhere in this Organizational Performance Framework.</p> <p>OTHER SPECIFIC ITEMS WE WILL COLLECT THIS YEAR WERE DISCUSSED AT THE COMPLIANCE MEETING AND SHARED IN THE ASSOCIATED SPREADSHEET. PLEASE REVIEW EPICENTER FOR SPECIFIC ITEMS.</p>	5
Corrective Action Plans	School has not had to develop and implement a corrective action plan (refers to sponsor evaluation corrective actions).	2
Intervention Protocol	School has never required sponsor intervention under the Intervention Protocol.	2

CMSD Site Visit Building Walkthrough

School: Near West Intergenerational School

Date: 11/13/2023

CMSD Staff Member: Matt Rado

Building and grounds	Yes	No	Somewhat	N/A	Notes
1. Name of school is outside building.	X				
2. Walkways to school entrances are cleared of snow, ice, and other potential hazards.	X				
3. The office is easy to find.	X				
4. Classrooms appear clean.	X				
5. Classroom furniture (desks, chairs) appear to be in good working order and are relatively clean.	X				
6. Bathrooms are clean and have needed supplies.	X				
7. Hallways are clean and create an inviting environment (through student work, posters, etc.).	X				
8. Floors throughout building are clean and not slippery.	X				
9. Stairwells appear safe (e.g., they have handrails, lighting is sufficient, etc.).	X				
10. Play areas are cleared of debris and any playground equipment is in good order.	X				

Culture	Yes	No	Somewhat	N/A	Notes
1. The school’s mission is apparent throughout the school building and through interactions with staff and students.	X				
2. The school environment seems calm and safe.	X				
3. Interactions between students and teachers seem respectful.	X				
4. Visitors are welcome and treated with respect.	X				

Other Compliance	Yes	No	Somewhat	N/A	Notes
1. Verify that the National Flag, which is not less than five feet in length, is displayed over, near, or within the school. (R.C. 3313.80, ODE Item 957)	X				
2. If a copy of the official motto of the U.S. or Ohio has been donated, ensure it has been accepted and is displayed in accordance with law. (R.C. 3313.801, ODE Item 958)				X	
3. Verify that information about Governing Authority members and meetings is posted and current. (Charter Contract, R.C. 121.22)	X				
4. Verify that the Worker’s Compensation Certificate is posted and current. (R.C. 4123, ODE Item 153)	X				
5. Verify that the public records policy is displayed and that a records custodian has been designated. ((R.C. 149.43 (E) (2))	X				
6. Review permission forms for medication, including EpiPens and inhalers, and review storage of medication. (R.C. 3313.716, 3313.718, ODE Items 211-212)	X				

Other Compliance, Ctd.	Yes	No	Somewhat	N/A	Notes
7. Review care plan for students with diabetes. Check for physician letters with instructions and ensure that not later than 14 days after receipt of an order, the school informs parent or guardian that student might be entitled to a 504 Plan. Also ensure that the school is tracking the number of students with diabetes and the number of errors associated with medication administration. (R.C. 3313.7112, ODE Item 213)	X				
8. Report card verification. Pursuant to Ohio law, schools must provide parents or guardians with a copy of the most recent record card during the admissions process. CMSD staff will check the enrollment package during the site visit to verify. (R.C. 3313.6411, ODE Item 436)				X	No paper enrollment
9. Verify that the Public Employment Risk Reduction Program (PERRP) poster is displayed. ((R.C.3314.03(A)(11)(d))	X				
10. The school's attendance and participation policies are available for public inspection. ((R.C. 3314.03(A)(27))	X				
11. Verify that the school's policy regarding suspension, expulsion, removal, and permanent exclusion is posted in a central location. (R.C. 3313.661)	X				
12. If the school had any students absent without legitimate excuse on the day of the site visit the school made an attempt, within two hours of the start of the school day, to contact the student's parent, guardian or caregiver. (R.C. 3321.141)	X				

Notes:

CLEVELAND METROPOLITAN SCHOOL DISTRICT



2022-23 ANNUAL

Charter School Sponsorship REPORT





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Introduction

The Cleveland Metropolitan School District (CMSD) is a portfolio school district, committed to the goal of ensuring that all students in Cleveland have the opportunity to attend a high-quality public school. Integral to the portfolio strategy is an understanding of and support for the valuable role public charter schools (referred to as Community Schools in Ohio law) can play in educating students. CMSD is committed to helping support and expand high-quality charter schools. There are three distinct ways in which CMSD works with charters—as a sponsor, as a partner, and through the District/Charter Compact. A brief description of these relationships is provided below; more information is at <https://www.clevelandmetroschools.org/charters>.

How CMSD works with public charter schools:

1) As a Charter School Sponsor

CMSD sponsored seven public charter schools during the 2022-23 year. A summary of their academic, organizational, and financial performance is detailed in this report. CMSD most recently revised its performance standards for the 2022-23 year.

2) As a Charter School Partner

The Cleveland Plan, signed into law in 2012, created a unique way that charter schools and CMSD could work together more collaboratively. Known as partnership, and defined in Ohio law in Section 3311.86 of the Revised Code, this relationship allows CMSD to share a portion of the proceeds of the local education levy approved by Cleveland voters in 2012 and renewed in 2016 and 2020. All CMSD-sponsored schools are partners. Additionally, charters not sponsored by CMSD can apply for partnership. In 2022-2023, CMSD partnered with 15 charters, which included our seven sponsored schools along with Cleveland College Preparatory School, Hope Academy Northwest Campus, Horizon Science Academy Cleveland, The Intergenerational School, Menlo Park Academy, Northeast Ohio College Preparatory School, Stepstone Academy, and Village Preparatory School Woodland Hills.

3) Through the Cleveland Education Compact

The Bill and Melinda B. Gates Foundation announced a District-Charter Collaboration Compact initiative in December 2010 to encourage and support collaboration in major metropolitan areas across the country. Since then, more than a dozen cities have signed Compact agreements detailing the ways in which districts and charters would work together for the benefit of all children in the city. Cleveland was awarded a district/charter planning grant in 2014 and finalized its district-charter Compact agreement in December 2015. The Compact was particularly active through 2020, with subcommittees comprised of district and charter staff working in areas including policy, enrollment, and special education. Members are currently discussing how to best use the Compact as a vehicle for district/charter collaboration.



Description of Performance Standards

Ohio law requires sponsors to submit an annual report evaluating and summarizing the compliance of each school they sponsor in the areas of academic performance, fiscal performance, organization and operation, and legal compliance. CMSD sponsored seven schools during the 2022-23 year. For academic, fiscal, and organizational and operational performance, sponsors are to identify whether a school met, exceeded, or did not meet the expected performance level. For legal compliance, sponsors must identify whether the category was met or not met.

CMSD defines performance expectations for each sponsored school in its charter contract. Descriptions of CMSD's performance expectations for each category, and methodology, appear in the appendices to this report. Appendix A contains the academic performance expectations. Appendix B contains the financial performance expectations. Appendix C contains both the organizational and operational expectations and the expectations for legal compliance. Please note that CMSD uses audited financial information as part of both the financial and organizational and operational categories.

All CMSD-sponsored schools adhere to the same academic, financial, and organizational performance expectations.

Please note that because CMSD's performance frameworks do not directly correspond to the requirements of ODE's annual report, modifications have been made and are described below. For example, CMSD often uses four categories (exceeds, meets, does not meet, falls far below) to assess performance in an indicator, whereas ODE uses three categories. Also, CMSD does not produce an overall rating for each category. CMSD considers each indicator but may assign more weight to certain indicators. Additionally, for the purposes of this report, CMSD has extracted the indicator for legal compliance from its organizational framework and assigned each school's rating in that area to the overall legal compliance category. CMSD also uses certain information in a variety of frameworks. For example, audit reports are used for financial reviews but are also considered part of the organizational framework.

An overall summary of each school's rating in each of the four performance areas required by ODE appears on the next page, along with a description of how CMSD defines the four components required. Additional information on indicators and methodology can be found elsewhere in the report and in the appendices.



Summary of 2022-23 Performance

School Name and IRN	Academic	Finance	Organization & Operation	Legal Compliance
Citizens Academy Southeast (015261)	Met	Met	Exceeded	Met
Citizens Leadership Academy East (012852)	Did Not Meet	Met	Exceeded	Met
Lakeshore Intergenerational School (014913)	Did Not Meet	Met	Exceeded	Met
Near West Intergenerational School (012030)	Met	Met	Exceeded	Met
Village Preparatory School Cliffs (011291)	Met	Met	Exceeded	Met
Village Preparatory School Willard (015722)	Did Not Meet	Met	Exceeded	Met
Wings Academy 1(000736)	Did Not Meet	TBD	Exceeded	Met

Description of Overall Ratings:

Academic

A school met expectations if it met four or more academic indicators (a majority of the seven possible indicators). Otherwise, a school did not meet expectations.

Financial

A school exceeded overall expectations if it met all seven indicators. A school met expectations if it met five or six indicators. A school did not meet expectations if it did not meet at least five applicable indicators.

Organizational and Operational:

A school exceeded expectations if it scored 90 percent or more on the organizational framework. It met expectations if it scored 80–89 percent. It did not meet expectations if it scored below 80 percent.

Legal

A school met expectations if its compliance rating from Epicenter was at least 85 percent.



Detailed Academic Performance Summary

The following table provides a summary of how each CMSD-sponsored charter school did on the applicable 2022-23 report card measures. All of these schools serve grades K-8. For more information on CMSD's academic performance standards, please see [Appendix A](#).

School Name and IRN	Overall	Achievement	Progress	Gap Closing	K3 Literacy	ELA and Math Achievement and Growth Indicators	Chronic Absenteeism
Citizens Academy Southeast (015261)	3 stars	2 stars	4 stars	4 stars	1 star	Meets	Meets
Citizens Leadership Academy East (012852)	2.5 stars	1 star	3 stars	3 stars	1 star	Does Not Meet	Meets
Lakeshore Intergenerational School (014913)	2 stars	2 stars	2 stars	1 star	1 star	Falls far below	Did Not Meet
Near West Intergenerational School (012030)	4 stars	3 stars	4 stars	4 stars	3 stars	Exceeds	Meets
Village Preparatory School Cliffs (011291)	4 stars	2 stars	5 stars	5 stars	1 star	Exceeds	Meets
Village Preparatory School Willard (015722)	2.5 stars	2 stars	2 stars	3 stars	2 stars	Does Not Meet	Meets
Wings Academy 1 (000736)	2 stars	1 star	2 stars	3 stars	1 star	Falls far below	Meets



Academic Performance Peer Comparison

Indicators (see Appendix A for full framework)

Achievement Component (Performance Index)	Progress Component	Early Literacy Component	Gap Closing Component
4 or 5 stars OR score in the 75th percentile or higher compared to peer group			
3 stars OR score in the 50th to 74.9th percentile compared to peer group			
2 stars OR score in the 25th to 49.9th percentile compared to peer group			
1 star OR score in the 24.9th percentile or lower compared to peer group			

Peer Comparison Percentiles

School Name and IRN	Achievement	Progress	K3 Literacy	Gap Closing
Citizens Academy Southeast (015261)	63rd percentile	81st percentile	58th percentile	81st percentile
Citizens Leadership Academy East (012852)	37th percentile	43rd percentile	30th percentile	45th percentile
Lakeshore Intergenerational School (014913)	51st percentile	23rd percentile	38th percentile	18th percentile
Near West Intergenerational School (012030)	99th percentile	99th percentile	67th percentile	67th percentile
Village Preparatory School Cliffs (011291)	88th percentile	99th percentile	57th percentile	98th percentile
Village Preparatory School Willard (015722)	47th percentile	29th percentile	41st percentile	53rd percentile
Wings Academy 1 (000736)	47th percentile	14th percentile	4th percentile	50th percentile



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Overall Academic Performance Summary

Based on Report Card Indicators and Peer Comparison

School Name and IRN	Overall Grade	Achievement	Progress	Gap Closing	K3 Literacy	ELA and Math Achievement and Growth Indicators	Chronic Absenteeism
Citizens Academy Southeast (015261)	Meets	Meets	Exceeds	Exceeds	Meets	Meets	Meets
Citizens Leadership Academy East (012852)	Does not meet	Does not meet	Meets	Meets	Does not meet	Does not meet	Meets
Lakeshore Intergenerational School (014913)	Does not meet	Meets	Does not meet	Falls Far Below	Does not meet	Falls Far Below	Does not meet
Near West Intergenerational School (012030)	Exceeds	Meets	Exceeds	Exceeds	Meets	Exceeds	Meets
Village Preparatory School Cliffs (011291)	Exceeds	Exceeds	Exceeds	Exceeds	Meets	Exceeds	Meets
Village Preparatory School Willard (015722)	Does not meet	Does not meet	Does not meet	Meets	Does not meet	Does not meet	Meets
Wings Academy 1 (000736)	Does not meet	Does not meet	Does not meet	Meets	Falls Far Below	Falls far below	Meets



Financial Performance Summary

The following table provides a summary of how each CMSD-sponsored charter school did on the contractual financial performance measures. For more information on these performance standards, please see [Appendix B](#).

School Name and IRN	Days Cash	Current Ratio	Enrollment	Surplus/ (Deficit)	Budget Variance	Increase/ (Decrease) in Cash	Debt to Assets Ratio
Citizens Academy Southeast (015261)	Meets	Meets	Meets	Concern	Below	Meets	Meets
Citizens Leadership Academy East (012852)	Meets	Meets	Below	Meets	Meets	Meets	Meets
Lakeshore Intergenerational School (014913)	Meets	Meets	Below	Meets	Below	Meets	Meets
Near West Intergenerational School (012030)	Meets	Meets	Meets	Meets	Below	Meets	Meets
Village Preparatory School Cliffs (011291)	Meets	Meets	Meets	Meets	Below	Meets	Meets
Village Preparatory School Willard (015722)	Meets	Meets	Meets	Concern	Below	Meets	Meets
Wings Academy 1(000736)	TBD*	TBD*	TBD*	TBD*	TBD*	TBD*	TBD*

*Year-end financials were not available as of the time of this report.

Individual School Profiles 2022-23





Citizens Academy Southeast

15700 Lotus Drive
Cleveland, OH 44128
(216) 586-3887

<https://breakthroughschools.org/citizens-academy-southeast/>
<https://breakthroughschools.org/citizens-leadership-academy-southeast/>

Mission: To produce learners who exemplify academic excellence and responsible citizenship.

Academic Rating: **Met Expectations**

The school met seven out of seven academic indicators.

Financial Rating: **Met Expectations**

The school met five of seven indicators.

Measure	Metric	Outcome	Score
Days Cash on Hand	Total cash divided by (total budgeted expenditures - depreciation)/365	82.18	Meets Standard
Current Ratio	Current assets divided by current liabilities	2.29	Meets Standard
Enrollment	Actual FTEs divided by budgeted FTEs	104%	Meets Standard
Surplus/(Deficit)	Change in net assets	(\$378,602)*	Area of Concern
Budget Variance	Budgeted revenues and expenses compared to actual revenues and expenses	More than 10% negative variance**	Below Standard
Increase/(Decrease) in Cash	Change in cash position as compared to prior year	\$68,964	Meets Standard
Debt to Assets Ratio	Total liabilities divided by total assets	.12	Meets Standard
Debt Covenants	Met covenants	NA	NA
Debt Payments	Timeliness of debt payments	NA	NA
Debt Default	Loan default	NA	NA

Organizational and Operational:

Citizens Academy Southeast scored over 90% on the Organizational Framework, which includes board training requirements, the annual audit, site visits, and others. CMSD's site visits and data collection confirm that the school is complying with its education program and other requirements as defined in its charter contract.

Legal:

Citizens Academy Southeast successfully completed and submitted 100 percent of required compliance items.



Citizens Academy Southeast

Historical Performance and Prospect for Renewal

This section summarizes the school's performance over the current contract term.

Category	School Year	Rating
Academics	2020-21	Did Not Meet*
Financial	2020-21	Met
Organization and Operation	2020-21	Exceeded
Legal	2020-21	Met

Academics	2021-22	Met
Financial	2021-22	Met
Organization and Operation	2021-22	Exceeded
Legal	2021-22	Met

Academics	2022-23	Met
Financial	2022-23	Met
Organization and Operation	2022-23	Exceeded
Legal	2022-23	Met

*The only academic indicator for that year was attendance.

Prospect for Renewal

The school met all seven academic indicators and should be commended for their strong performance.



Citizens Leadership Academy East

12523 Woodside Avenue

Cleveland, OH 44108

(216) 367-9392

<https://breakthroughschools.org/citizens-academy/>

<https://breakthroughschools.org/citizens-leadership-academy/>

Mission: To produce learners who exemplify academic excellence and responsible citizenship.

Academic Rating: **Did Not Meet Expectations**

The school met three out of seven indicators.

Financial Rating: **Met Expectations**

The school met six of seven indicators.

Measure	Metric	Outcome	Score
Days Cash on Hand	Total cash divided by (total budgeted expenditures - depreciation)/365	331.39	Meets Standard
Current Ratio	Current assets divided by current liabilities	13.81	Meets Standard
Enrollment	Actual FTEs divided by budgeted FTEs	80%	Below Standard
Surplus/(Deficit)	Change in net assets	\$4,309,505	Meets Standard
Budget Variance	Budgeted revenues and expenses compared to actual revenues and expenses	<10% Negative	Meets Standard
Increase/(Decrease) in Cash	Change in cash position as compared to prior year	\$1,976,872	Meets Standard
Debt to Assets Ratio	Total liabilities divided by total assets	.04	Meets Standard
Debt Covenants	Met covenants	NA	NA
Debt Payments	Timeliness of debt payments	NA	NA
Debt Default	Loan default	NA	NA

Organizational and Operational:

Citizens Leadership Academy East scored over 90% on the Organizational Framework, which includes board training requirements, the annual audit, site visits, and others. CMSD's site visits and data collection confirm that the school is complying with its education program and other requirements as defined in its charter contract.

Legal:

Citizens Leadership Academy East successfully completed and submitted 100 percent of required compliance items.



Citizens Leadership Academy East

Historical Performance and Prospect for Renewal

This section summarizes the school's performance over the current contract term.

Category	Year	Rating
Academics	2019-20	Did Not Meet*
Financial	2019-20	Exceeded
Organization and Operation	2019-20	Exceeded
Legal	2019-20	Met

Academics	2020-21	Did Not Meet*
Financial	2020-21	Exceeded
Organization and Operation	2020-21	Exceeded
Legal	2020-21	Met

Academics	2021-22	Did Not Meet
Financial	2021-22	Met
Organization and Operation	2021-22	Exceeded
Legal	2021-22	Met

Academics	2022-23	Did Not Meet
Financial	2022-23	Met
Organization and Operation	2022-23	Exceeded
Legal	2022-23	Met

*The only academic indicator for these years was attendance.

Prospect for Renewal

The school met three of seven indicators last year, and showed a strong increase in achievement. They are currently undergoing the renewal process.



Lakeshore Intergenerational School

18025 Marcella Road

Cleveland, OH 44119

(216) 586-3872

<https://www.igschools.org/lakeshore-intergenerational-school/>

Mission: The Intergenerational Schools connect, create, and guide a multigenerational community of lifelong learners and spirited citizens.

Academic Rating: Did Not Meet Expectations.

The school met one out of seven indicators. .

Financial Rating: Met Expectations.

The school met five of seven indicators.

Measure	Metric	Outcome	Score
Days Cash on Hand	Total cash divided by (total budgeted expenditures - depreciation)/365	260.19	Meets Standard
Current Ratio	Current assets divided by current liabilities	4.81	Meets Standard
Enrollment	Actual FTEs divided by budgeted FTEs	85%	Below Standard
Surplus/(Deficit)	Change in net assets	\$398,160	Meets Standard
Budget Variance	Budgeted revenues and expenses compared to actual revenues and expenses	More than 10% negative variance*	Below Standard
Increase/(Decrease) in Cash	Change in cash position as compared to prior year	\$706,745	Meets Standard
Debt to Assets Ratio	Total liabilities divided by total assets	.14	Meets Standard
Debt Covenants	Met covenants	NA	NA
Debt Payments	Timeliness of debt payments	NA	NA
Debt Default	Loan default	NA	NA

Organizational and Operational:

Lakeshore Intergenerational School scored over 90% on the Organizational Framework, which includes board training requirements, the annual audit, site visits, and others. CMSD's site visits and data collection confirm that the school is complying with its education program and other requirements as defined in its charter contract.

Legal:

Lakeshore Intergenerational School successfully completed and submitted 100 percent of required compliance items.



Lakeshore Intergenerational School

Historical Performance and Prospect for Renewal

This section summarizes the school's performance over the current contract term.

Category	Year	Rating
Academics	2020-21	Did Not Meet*
Financial	2020-21	Exceeded
Organization and Operation	2020-21	Exceeded
Legal	2020-21	Met

Academics	2021-22	Met
Financial	2021-22	Met
Organization and Operation	2021-22	Exceeded
Legal	2021-22	Met

Academics	2022-23	Did Not Meet
Financial	2022-23	Met
Organization and Operation	2022-23	Exceeded
Legal	2022-23	Met

*The only academic indicator for that year was attendance.

Prospect for Renewal

The school only met one academic indicator. The sponsor will continue to monitor the school closely.



Near West Intergenerational School

3805 Terrett Avenue

Cleveland, OH 44113

(216) 961-4308

<https://www.igschools.org/near-west-intergenerational-school/>

Mission: The Intergenerational Schools connect, create, and guide a multigenerational community of lifelong learners and spirited citizens.

Academic Rating: **Met Expectations**

The school met all seven academic indicators.

Financial Rating: **Met Expectations**

The school met six of seven indicators.

Measure	Metric	Outcome	Score
Days Cash on Hand	Total cash divided by (total budgeted expenditures - depreciation)/365	506.33	Meets Standard
Current Ratio	Current assets divided by current liabilities	16.96	Meets Standard
Enrollment	Actual FTEs divided by budgeted FTEs	100%	Meets Standard
Surplus/(Deficit)	Change in net assets	\$1,119,841	Meets Standard
Budget Variance	Budgeted revenues and expenses compared to actual revenues and expenses	More than 10% negative variance*	Below Standard
Increase/(Decrease) in Cash	Change in cash position as compared to prior year	\$705,143	Meets Standard
Debt to Assets Ratio	Total liabilities divided by total assets	.06	Meets Standard
Debt Covenants	Met covenants	NA	NA
Debt Payments	Timeliness of debt payments	NA	NA
Debt Default	Loan default	NA	NA

Organizational and Operational:

Near West Intergenerational School scored over 90% on the Organizational Framework, which includes board training requirements, the annual audit, site visits, and others. CMSD's site visits and data collection confirm that the school is complying with its education program and other requirements as defined in its charter contract.

Legal:

Near West Intergenerational School successfully completed and submitted 100 percent of required compliance items.



Near West Intergenerational School

Historical Performance and Prospect for Renewal

This section summarizes the school’s performance over the current contract term.

Category	Year	Rating
Academics	2019-20	Met*
Financial	2019-20	Exceeded
Organization and Operation	2019-20	Exceeded
Legal	2019-20	Met

Academics	2020-21	Met*
Financial	2020-21	Exceeded
Organization and Operation	2020-21	Exceeded
Legal	2020-21	Met

Academics	2021-22	Met
Financial	2021-22	Met
Organization and Operation	2021-22	Exceeded
Legal	2021-22	Met

Academics	2022-23	Met
Financial	2022-23	Met
Organization and Operation	2022-23	Exceeded
Legal	2022-23	Met

*The only academic indicator for these years was attendance.

Prospect for Renewal

The school met all seven academic indicators and is on track for renewal. They are currently undergoing the renewal process.



Village Preparatory School Cliffs

1417 E. 36th Street
Cleveland, OH 44114
(216) 456-2070

<https://breakthroughschools.org/village-prep-cliffs/>
<https://breakthroughschools.org/e-prep-cliffs/>

Mission: The Prep Schools seek to provide a high quality, academically rigorous education for the college bound scholar.

Academic Rating: **Met Expectations**

The school met all seven academic indicators.

Financial Rating: **Met Expectations**

The school met six of seven indicators.

Measure	Metric	Outcome	Score
Days Cash on Hand	Total cash divided by (total budgeted expenditures - depreciation)/365	306.10	Meets Standard
Current Ratio	Current assets divided by current liabilities	10.00	Meets Standard
Enrollment	Actual FTEs divided by budgeted FTEs	100%	Meets Standard
Surplus/(Deficit)	Change in net assets	\$3,403,309	Meets Standard
Budget Variance	Budgeted revenues and expenses compared to actual revenues and expenses	More than 10% negative variance*	Below Standard
Increase/(Decrease) in Cash	Change in cash position as compared to prior year	\$2,550,250	Meets Standard
Debt to Assets Ratio	Total liabilities divided by total assets	.08	Meets Standard
Debt Covenants	Met covenants	NA	NA
Debt Payments	Timeliness of debt payments	NA	NA
Debt Default	Loan default	NA	NA

Organizational and Operational:

Village Preparatory School Cliffs scored over 90% on the Organizational Framework, which includes board training requirements, the annual audit, site visits, and others. CMSD's site visits and data collection confirm that the school is complying with its education program and other requirements as defined in its charter contract.

Legal:

Village Preparatory School Cliffs successfully completed and submitted 100 percent of required compliance items.



Village Preparatory School Cliffs

Historical Performance and Prospect for Renewal

This section summarizes the school's performance over the current contract term.

Category	Year	Rating
Academics	2019-20	Met*
Financial	2019-20	Exceeded
Organization and Operation	2019-20	Exceeded
Legal	2019-20	Met

Academics	2020-21	Did Not Meet*
Financial	2020-21	Exceeded
Organization and Operation	2020-21	Exceeded
Legal	2020-21	Met

Academics	2021-22	Met
Financial	2021-22	Met
Organization and Operation	2021-22	Exceeded
Legal	2021-22	Met

Academics	2022-23	Met
Financial	2022-23	Met
Organization and Operation	2022-23	Exceeded
Legal	2022-23	Met

Prospect for Renewal

The school met all seven academic indicators and is on track for renewal. They are currently undergoing the renewal process.



Village Preparatory School Willard

9401 Willard Avenue

Cleveland, OH 44102

(216) 586-3892

<https://breakthroughschools.org/village-prep-willard/>

<https://breakthroughschools.org/e-prep-willard/>

Mission: The Prep Schools seek to provide a high quality, academically rigorous education for the college bound scholar.

Academic Rating: **Did Not Meet Expectations**

The school met two out of seven academic indicators. .

Financial Rating: **Met Expectations**

The school met five of seven indicators.

Measure	Metric	Outcome	Score
Days Cash on Hand	Total cash divided by (total budgeted expenditures - depreciation)/365	156.28	Meets Standard
Current Ratio	Current assets divided by current liabilities	5.94	Meets Standard
Enrollment	Actual FTEs divided by budgeted FTEs	98%	Meets Standard
Surplus/(Deficit)	Change in net assets	(\$367,430)*	Area of Concern
Budget Variance	Budgeted revenues and expenses compared to actual revenues and expenses	More than 10% negative variance*	Below Standard
Increase/(Decrease) in Cash	Change in cash position as compared to prior year	\$1,102,315	Meets Standard
Debt to Assets Ratio	Total liabilities divided by total assets	.09	Meets Standard
Debt Covenants	Met covenants	NA	NA
Debt Payments	Timeliness of debt payments	NA	NA
Debt Default	Loan default	NA	NA

Organizational and Operational:

Village Preparatory School Willard scored over 90% on the Organizational Framework, which includes board training requirements, the annual audit, site visits, and others. CMSD's site visits and data collection confirm that the school is complying with its education program and other requirements as defined in its charter contract.

Legal:

Village Preparatory School Willard successfully completed and submitted 100 percent of required compliance items.



Village Preparatory School Willard

Historical Performance and Prospect for Renewal

This section summarizes the school's performance over the current contract term.

Category	Year	Rating
Academics	2021-22	Did Not Meet
Financial	2021-22	Met
Organization and Operation	2021-22	Exceeded
Legal	2021-22	Met

Academics	2022-23	Did Not Meet
Financial	2022-23	Met
Organization and Operation	2022-23	Exceeded
Legal	2022-23	Met

Prospect for Renewal

The school only met one academic indicator. The sponsor will continue to monitor the school closely.



Wings Academy 1

10615 Lamontier Avenue

Cleveland, OH 44104

(216) 812-0244

<https://www.wingsacademies.org/>

Mission: Creating and executing an innovative and academically excellent learning environment for our students that focuses on expert reading, writing, math, and their history as the foundation for high self-esteem, critical thinking, problem-solving, financial literacy, emotional intelligence, and analytical skills.

Academic Rating: Did Not Meet Expectations

The school met two out of seven indicators.

Financial Rating: TBD.

Year-end financials were not available as of the date of this report.

Organizational and Operational:

Wings Academy scored over 90% on the Organizational Framework, which includes board training requirements, the annual audit, site visits, and others. CMSD's site visits and data collection confirm that the school is complying with its education program and other requirements as defined in its charter contract.

Legal:

Wings Academy successfully completed and submitted 100 percent of required compliance items.



Wings Academy 1

Historical Performance and Prospect for Renewal

This section summarizes the school's performance over the current contract term.

Category	Year	Rating
Academics	2020-21	Did Not Meet*
Financial	2020-21	Exceeded
Organization and Operation	2020-21	Exceeded
Legal	2020-21	Met

Academics	2021-22	Met
Financial	2021-22	Met
Organization and Operation	2021-22	Exceeded
Legal	2021-22	Met

Academics	2022-23	Did Not Meet
Financial	2022-23	TBD
Organization and Operation	2022-23	Exceeded
Legal	2022-23	Met

Prospect for Renewal

The school only met two academic indicators. The sponsor will continue to monitor the school closely.

Appendices





Appendix A-C: Academic, Financial, and Organizational Frameworks

Pursuant to the Sponsorship Contract, the Performance Framework enclosed herein ensures that each community school sponsored by Cleveland Metropolitan School District (CMSD) provides high-quality education to its students. The Framework includes the academic, organizational, and financial standards by which sponsored schools will be evaluated.

The Performance Framework will be used to evaluate whether a community school's contract should be renewed. It will also be used throughout the life cycle of the school to communicate the school's performance to its staff, governing authority, sponsor, and other stakeholders. The Performance Framework will provide the basis of the annual report that CMSD must provide annually to the Ohio Department of Education (ODE).

In addition to establishing performance criteria for community schools, the Performance Framework holds CMSD accountable to community schools. CMSD is accountable for implementing a rigorous and fair oversight process that respects the autonomy that is vital to community school success.

It is this mutual obligation that drives the CMSD Performance Framework—a collaborative effort with the common objective of providing Ohio students with a high-quality education that prepares them for post-graduation academic and career success.

Finally, the Performance Framework is a living document, subject to continuous review and improvement.



Appendix A

Academic Performance Framework

Pursuant to the Sponsorship Contract, the Performance Framework includes the agreed-upon goals that the governing authority of the community school and CMSD will use to evaluate the performance of the school during the term of this contract.

Guiding Principles of the Academic Performance Framework

1. The Academic Performance Framework meets state expectations for how authorizers/sponsors hold their schools accountable:
 - a. The framework considers all Ohio state report card measures and subgroup performance by including the Overall Rating a school receives.
 - b. The framework includes annual, specific metrics and targets for all applicable state report card measures and considers in particular student performance, student growth, and chronic absenteeism. These measures provide a sense of proficiency, growth, and school culture respectively.
 - c. The Gap Closing measure from the report card is used to set specific proficiency targets for subgroups.
 - d. The framework includes additional measures and targets beyond the Gap Closing target for any applicable subgroups.
 - e. The framework includes mission-specific measures and targets.
 - f. The framework compares the performance of schools to state standards as well as to schools serving similar student populations (based on percent students with disabilities, percent of English language learners, and percent of economically disadvantaged students).
2. The framework recognizes schools that exceed or meet standards according to state cutpoints, while also providing opportunities for schools to demonstrate quality in comparison to peers.
3. The framework provides a dashboard of information that provides information on how schools are performing during the term of their contract.
4. The same framework can be applied to multiple schools allowing for an even playing field.



Framework Indicators and ratings

The table below shows the indicators included in the performance framework and how ratings are assigned for each indicator. Generally, the indicator ratings align with the ratings from the state report card. For some indicators, schools have an additional opportunity to score a rating based on a comparison with peers. In these cases, a school will receive the highest rating corresponding to either their state rating or peer comparison.

Indicator	Overall Report Card Grade	Achievement Component (Performance Index)	Progress Component	Early Literacy Component	Gap Closing Component	ELA and Math Achievement and Growth Indicators	Chronic Absenteeism Indicator
Exceeds	4 or 5 stars	4 or 5 stars OR score in the 75th percentile or higher compared to peer group				45% or more of indicators met	4 or 5 points
Meets	3 stars	3 stars OR score in the 50th to 74.9th percentile compared to peer group				30% to 44.9% of indicators met	3 points
Does Not Meet	2 stars	2 stars OR score in the 25th to 49.9th percentile compared to peer group				10% to 29.9% of indicators met	2 points
Falls far below	1 star	1 star OR score in the 24.9th percentile or lower compared to peer group				Less than 10% of indicators met	1 point

Indicator Descriptions

Overall report card rating: A summary rating of a school’s overall performance on state standards. Including this measure aligns with the state’s method of sponsor ratings and ensures we meet obligations to hold schools accountable for all applicable report card data.

Achievement component (Performance Index): The Achievement rating for schools is based on the Performance Index, one of the most enduring measures on the state report card. We believe that achievement AND growth combined provide a strong indicator of how well a school is serving the academic needs of students.

Progress Component: The Progress rating for schools is based on the statewide growth measure used. Growth measures provide opportunities for all schools to demonstrate success, even with a student population that begins as low achieving. We believe that achievement AND growth combined provide a strong indicator of how well a school is serving the academic needs of students.

Early Literacy Component: The Early Literacy component combines multiple measures related to the preparedness of students in grades K-3 to be productive readers by the time they enter fourth grade. These measures consider both promotion/proficiency of third grade students and improvements made in literacy for off track students.

Gap Closing Component: The Gap Closing component evaluates whether schools are closing/meeting expected performance thresholds for student subgroups across multiple measures. Monitoring this data ensures that schools are providing equitable learning opportunities that meet the needs of ALL students. It also aligns with a requirement that we set targets and monitor performance for student subgroups.

ELA and Math Achievement and Growth Indicators: These indicators from the Gap Closing component evaluate how well a school does in meeting the needs of individual student subgroups in ELA and Math. We include the measure to emphasize the need to meet achievement and growth targets for all subgroups of students. Including these types of measures is also a component of how we are evaluated as a sponsor.

Chronic Absenteeism Indicator: The Chronic Absenteeism indicator is a specific measure found within the Gap Closing component. We place emphasis on this measure as a mission specific metric that reflects our shared belief that students cannot succeed in school if they do not consistently attend school.



Peer group calculations

For each school, we create a matched peer group of other demographically similar charter schools. The purpose of these peer groups is to: 1) inform schools of how they perform relative to their demographic peers and 2) provide schools another opportunity to meet standards in this academic framework. Our belief is that even if a school is not meeting state standards, they should be considered for renewal if they show evidence that they provide a superior educational experience compared to other, similar schools.

To calculate peer groups, we consider three different matching factors: the percentage of students with disabilities, the percentage of English language learners, and the percentage of economically disadvantaged students. These factors were selected to focus grouping on demographic characteristics that are largely outside of a school's control, as opposed to performance characteristics (like attendance, achievement, etc.) which are an output of the school. We are also limited by what data is made available for all schools by the Ohio Department of education.

Peer groups are calculated by finding the standardized distance between a sponsored school and every other charter school in the state of Ohio for the above three factors. The first step is to standardize each of the three factors above. This means setting the mean at a value of zero and values for each of the factors represents the number of standard deviations above or below the mean that a school falls on. Using the three standardized factors, we then calculate the Euclidean distance between all schools. The formula for two schools (p, q) given three input factors (1, 2, 3) is:

$$d(p, q) = \sqrt{(p_1 - q_1)^2 + (p_2 - q_2)^2 + (p_3 - q_3)^2}$$

All schools with a total distance less than 0.75 units are considered a peer. In practice, this means that schools will be matched to other schools that are slightly different to them across all three factors OR very similar to them on two factors but moderately different on a third factor. The selection of the cut point to use for determining which schools are in a peer group balances the desire to have a large peer group to compare to while also ensuring that schools are not dissimilar to each other.



Appendix B

Financial Performance Framework

The purpose of the CMSD Financial Performance Framework is to measure and evaluate the financial health of all CMSD-sponsored charter schools. The framework is an accountability tool that will be used on a monthly basis, as required by law, to guide discussions between CMSD and CMSD sponsored charter schools. The monthly meetings regarding the framework are not summative, but rather provide the basis for discussions. School ratings on the financial framework will be published annually and submitted to the school's governing authority, parents, and the Ohio Department of Education (ODE), pursuant to section 3301-102-05 of the Ohio Administrative Code.

CMSD will provide monthly written reports with feedback and proactive recommendations, as appropriate, that help the schools achieve greater efficiencies or that result in timely interventions, if needed. Collecting this data is paramount to ensuring that each sponsored school maintains the public trust and fulfills its fiduciary responsibility by maintaining a quality school that spends public funds appropriately and adheres to the laws, rules, and charter requirements as governed by its governing authority.

The measures in this framework are designed to be complementary; no single measure provides a full picture of the financial health of a school. Together, however, the measures provide a comprehensive assessment of the school's financial health and viability based on the school's historic trends, near-term financial situation, and future viability.

It is important to note that if a school receives a "concern" or "below standard" rating, it may or may not be in financial distress. The Financial Performance Framework is meant to flag any areas for further investigation. In the event an area is flagged, CMSD may request additional documentation from a school. The rating may be adjusted if sufficient evidence is provided. An example of additional information taken into consideration for rating purposes could be a long-term strategic partnership that acts as an additional funding source for the school. CMSD will provide schools with a preliminary report before ratings are published so as to give schools time to respond.

To ensure execution of the aforementioned framework and compliance with Ohio Revised Code 33314.023, sponsored schools must agree to participate in a monthly review process to measure and review the financial and enrollment records. CMSD will work to encourage a culture of learning and sharing of best practices to help ensure that all sponsored schools are supported to meet the financial goals outlined in the framework.

CMSD will conduct monthly, quarterly and annual reviews to assess different components of a school's financial wellbeing as detailed below. Should there be any areas of concern, CMSD may request additional information from the schools to demonstrate both short and long-term financial viability.

For a school to be considered for contract renewal, any areas of concern at the time of review must be addressed with sufficient documentation, as determined by CMSD, demonstrating short- and long-term viability.



MONTHLY

Goal

Review how schools are managing their resources to ensure sufficient liquidity.

Documents to review

- Balance Sheet
- Statement of Activities
- Enrollment

Review focuses on three metrics

- Days cash on hand
- Current ratio
- Actual enrollment as compared to budgeted enrollment

Monthly reports

The monthly reports will not be scored. They will consist of topics discussed and high-level findings. However, should there be a concern related to these metrics or other aspects of the school's financial management, we will note this in the monthly report and may ask for additional information.

Monthly Measures

Measure	Metric	Area of Concern
Days Cash on Hand	Total cash divided by (total budgeted expenditures - depreciation)/365	Less than 20 days
Current Ratio	Current assets divided by current liabilities	Less than 1.0
Enrollment	Actual FTEs divided by budgeted FTEs	Below 90%



QUARTERLY

Goal

Review how schools are progressing during the school year against their budget and financial goals and provide schools with targeted feedback.

Documents to review

- All monthly documents
- Quarterly surplus/(deficit)
- Quarterly budget to actual

Review focuses on the monthly metrics as well as the following

- Change in net assets
- Budgeted revenue and expenses as compared to actual revenues and expenses

Quarterly report

The quarterly report will be more comprehensive than the monthly report. It will note areas of financial strength and weakness and will highlight any areas of concern. These reports will include calculations for the metrics and will discuss their implications however, they will not include a score.

As with the monthly report, if there are areas of financial concern raised by the quarterly review, we will note this in the report and may ask for additional information.

Quarterly Measures

Measure	Metric	Area of Concern
Days Cash on Hand	Total cash divided by (total budgeted expenditures - depreciation)/365	Less than 20 days
Current Ratio	Current assets divided by current liabilities	Less than 1.0
Enrollment	Actual FTEs divided by budgeted FTEs	Below 90%
Surplus/(Deficit)	Change in net assets	Unplanned decrease in net assets
Budget Variance	Budgeted revenues and expenses compared to actual revenues and expenses	More than 10% negative variance on major budget lines



ANNUALLY

Goal

- Provide a comprehensive review of the prior year's financial management to provide schools with useful feedback as they progress through the current school year.
- Ohio sponsors are required by law to monitor and evaluate the academic and fiscal performance, along with the organizational, operational and legal compliance, of each school they sponsor and submit a written report of the evaluation results to the parents of students enrolled in the community school and ODE by Nov. 30 each year. CMUSD presents the reports to each governing board at a governing board meeting, requires schools to post the report on their websites, and also posts the report on the CMUSD website.

Documents to review

The year-end review will be scored and will analyze the monthly and quarterly materials and will require the following additional documents:

- Financial statements (balance sheet and income statement) for the entire prior school year as they will be presented to the auditor including all year-end accrual entries;
- Final budget to actual reports with explanations for any major variances; and
- Any written documents that the school wishes CMUSD to consider.

The annual review will focus on the following measures

- Days cash on hand;
- Current ratio;
- Average annual enrollment as compared to the budgeted enrollment;
- Annual surplus/(deficit);
- Annual change in cash position;
- Assessment of net assets (excluding the entries made for government pensions);
- Annual budget variance; and
- Written statement from the school that either states that the school has no debt or that the school has debt; if the school has debt, the written statements should identify whether or not the school has made all loan payments on time, whether or not the school has met all required covenants associated with the debt, and whether or not the debt is in default.

Annual year-end report

The annual report will be in the form of a scorecard and will note any explanations and/or materials provided by the school. There will also be a brief narrative which explains the scoring and describes the school's financial position at year-end.



Annual Measures

Measure	Metric	Meets Standard	Area of Concern	Below Standard
Days Cash on Hand	Total cash divided by (total budgeted expenditures - depreciation)/365	30 days	20–30 days	Below 20 days
Current Ratio	Current assets divided by current liabilities	1.1 or higher	1.0 to 1.1	Below 1.0
Enrollment	Actual FTEs divided by budgeted FTEs	95% or higher	90% to 95%	90% or lower
Surplus/(Deficit)	Change in net assets	Increase in net assets	Planned decrease in net assets (per budget)	Unplanned decrease in net assets
Budget Variance	Budgeted revenues and expenses compared to actual revenues and expenses	No more than 10% negative variance on major budget lines		More than 10% negative variance on major budget lines
Increase/(Decrease) in Cash	Change in cash position as compared to prior year	Positive cash flow	Planned decrease in cash (per budget)	Unplanned decrease in cash position
Debt to Assets Ratio	Total liabilities divided by total assets	0.90 or lower	0.90 to 0.99	1.00 or higher
Debt Covenants	Met covenants	Met covenants		Did not meet covenants
Debt Payments	Timeliness of debt payments	No late debt payments		Late debt payments
Debt Default	Loan default	No default		Loan in default

Additional Reviews

In addition to the monthly, quarterly and annual reports, CMSD will review and report on the following:

- Annual audit which will utilize the same metrics as the year-end annual reviews;
- Annual five-year forecasts submitted in May for the upcoming years; CMSD will focus on whether or not the school used realistic assumptions and will assess the school's projected year-end financial positions for each year; and
- Annual budgets submitted in October for the current year, which will focus on whether or not the school used realistic assumptions and will assess the school's projected year-end financial positions.

These additional reviews will be incorporated into the monthly or quarterly reports.



Appendix C: Organizational Performance Framework

Overview

The purpose of the Organizational Performance Framework is to establish and communicate the compliance-related standards by which CMSD will monitor and evaluate its sponsored schools. The items included in the framework come from Ohio Department of Education (ODE) requirements, contract requirements, and state law. When a number is listed in the Item column, it refers to the number from ODE's School Compliance worksheet, available online and updated annually. CMSD staff consulted with all of its sponsored schools to prioritize and organize these items. Items are weighted according to their importance and are organized into nine categories: Access and Student Rights, Health and Safety, Human Capital, Governance, Admissions, Educational Program, Fiscal, Site Visit, and Other.

CMSD aims to maximize school operational autonomy by articulating the base set of state and federal laws, rules, regulations, and contractual obligations that apply to its sponsored schools.

CMSD will primarily use Epicenter to track compliance. Items not submitted by Epicenter deadlines will result in lost points for those items. Policies/compliance items will be reviewed on due dates.

Some compliance-related requirements cannot be assessed via Epicenter. CMSD will also conduct fall and spring site visits, as required by law. CMSD will provide schools with advance notice of site visits. Please review the CMSD Comprehensive Site Visits: Purpose and Protocol document for detailed information on site visits. The bulk of Epicenter due dates are aligned with the fall and spring site visits. For example, CMSD will review all special education policies in the fall and all admission policies in the spring.

To be considered for contract renewal, a school will be expected to have no outstanding notices of breach or concern. A notice is outstanding if the school has failed to submit a remedial action plan that has been approved by CMSD.

Scoring

100 points possible

Exceeds Expectations: 90 to 100 points

Meets Expectations: 80 to 89 points

Does Not Meet Expectations: Below 80 points

Category 1: Access & Student Rights, 18

Category 2: Health & Safety, 14

Category 3: Human Capital, 12

Category 4: Governance, 14

Category 5: Admissions, Enrollment, and Attendance, 8

Category 6: Education Program, 10

Category 7: Fiscal, 7

Category 8: Site Visit, 8

Category 9: Other, 9



1. Access & Student Rights (18 points possible)

1A) Subcategory: Special Education (13)

Item	Description	Points Possible
171, 172, 174, 175, 176, 178	Written policies for special education as required by Ohio Revised Code: <ul style="list-style-type: none"> • Provision of services (171) • IEP development and implementation (172) • Confidentiality (174) • Identification and evaluation of homeless students with disabilities (175) • Free appropriate public education (176) • Ensuring compliance with IDEIA (178) 	6
172	IEPs implemented as written	2
173	Standards/procedures for identification and evaluation of students with disabilities consistent with federal and state law	2
177	Services delivered in the least restrictive environment while also allowing for a continuum of services	2
182	School submitted plan to ODE for serving students with disabilities	1

1B) Subcategory: Student Rights (3)

Item	Description	Points Possible
405 and 406	Does school provide due process for students suspended, expelled, removed AND does the school follow the policy?	2
901	School has adopted policy on Positive Behavioral Intervention and Supports that complies with Ohio requirements	1

1C) Subcategory: Access

Item	Description	Points Possible
432	School will achieve racial and ethnic balance reflective of community it serves	2



2. Health & Safety (14 points possible)

2A) Subcategory: Food safety (3)

Item	Description	Points Possible
705	School has adopted a policy to protect students with peanut or other food allergies.	1
778	School ensures that at least one employee is present during food service who is trained in the Heimlich maneuver.	2

2B) Subcategory: Facilities (5)

Item	Description	Points Possible
752	School does not apply lead-based paint and complies with all orders and requirements for inspection, maintenance, and prevention of lead-based poisoning.	2
759	School timely submitted an emergency management plan in the form required by ODE and the plan was approved.	1
Safety drills	School held all of its required rapid safety and dismissal drills, including tornado drills, in appropriate months and a drill within first 10 days of school.	2

2C) Subcategory: Student wellness (6)

Item	Description	Points Possible
703	School has screened pupils enrolled in either kindergarten or first grade prior to Nov. 1 for hearing, vision, speech and communications, or medical problems and developmental disorders AND notified parents of the screening before August 1.	2
706	School has adopted policies and procedures regarding child abuse reporting and training of all staff and volunteers as to their obligation to report and consequences for failure to do so. Requires policy and training records.	2
755	School's governing authority reviewed policies and procedures to ensure safety of students, employees and other persons using a school building from any known hazards in the building or on building grounds that pose an immediate risk to health or safety.	1
761	School adopted required policy prohibiting harassment, intimidation, and bullying.	1



3. Human Capital (12 points possible)

3A) Subcategory: Licensure/Professional

Item	Description	Points Possible
118	School sees that students on reading monitoring improvement plans (applies to grades 3 and 4 only) are taught by teachers with the appropriate license, endorsements, and/or qualifications.	1
603	School will suspend a person from all duties that require the care, custody, or control of a child during the pendency of the criminal action against the person-applicable when an employee was subject to criminal action.	1
611	School has a local professional development committee to determine coursework and other professional development needed by licensed educators to satisfy the renewal of such licenses.	1
607	All school teachers, aides, and providers are properly licensed by the State Board of Education.	2
Teacher retention	School has submitted annual reports on staff and teacher turnover, if requested by sponsor.	2

3B) Subcategory: Background checks

Item	Description	Points Possible
622, 623, 624, 625, 626	The school has done all required criminal background checks	5



4. Governance (14 points possible)

Item	Description	Points Possible
655	School has posted on its website the names of school's governing authority and provides, upon request, the name and address of each member of the governing authority to the sponsor and ODE.	1
664	School's meetings of its governing authority are public meetings, provide public advance notice, and follow all laws with respect to proper public meeting protocol.	3
667	School's governing authority members, fiscal officer, administrators and supervisory staff are annually trained on the public records and open meetings laws.	1
316/668	School fills public records requests in a timely manner, and at least one person, as designated by school, has attended training approved by the Ohio attorney general about school's obligations pertaining to public records.	3
658	Governing authority members have no interest in public contracts or other unaddressed ethical conflicts of interest, etc.	1
659	No member of governing authority also serves on a district board of education.	1
661	School uses independent counsel when required.	1
662	School has submitted current and complete Comprehensive Plan, or verified that sponsor has it on file; has submitted all policies and procedures on internal financial controls; and has adhered to Comprehensive Plan and these policies and procedures and ensured compliance by any contractor.	3



5. Admissions, Enrollment, and Attendance (8 points possible)

Item	Description	Points Possible
401	School provides parents with the proper notice of truancy, utilizes an intervention strategy, and/or files a complaint in juvenile court when appropriate for students that are truant. School's governing authority has adopted policy regarding habitual truancy and intervention strategies.	2
426	School has admission procedures that specify the items outlined in ORC 3314.06.	2
427	School has an admission policy that addresses students residing outside the district of residence.	1
429	School maintains complete and accurate reporting of student enrollment data used to calculate payments, and school's borrowing and expenditures are consistent with legal requirements.	1
436	School provides parents or guardians with a copy of the most recent Ohio state report card during the admissions process.	1
Lottery	If required by ORC 3314.06, and subject to any preferences allowed under that provision, school has selected students for admission using a random lottery.	1



6. Education Program (10 points possible)

Item	Description	Points Possible
101	School provides at least 920 hours of learning opportunities to at least 25 students.	1
105	School has adopted a policy, updated annually, governing academic prevention and intervention services covering requirements of law, which include but are not limited to measuring student progress, identifying students not attaining proficiency thresholds, collect and using student performance data, and provision of prevention/intervention services.	1
116	School promotes students to fourth grade when all criteria outlined in ORC 3313.608 are met.	1
117	School continues any required intervention services for students not promoted to 4th grade, consistent with the requirements of ORC 3313.608.	1
217	School provides intervention services to students not meeting certain proficiency level.	2
220	School administers state diagnostic tests to students in required categories and to all students in the appropriate grade level at least once annually, providing the information to parents and ODE.	1
309	School administers all required assessments and submits all data required to calculate the report card to ODE.	1
902	School has adopted a grade promotion and retention policy that prohibits the promotion of a student to the next grade level if the student has been truant for more than 10% of the required attendance days of the current school year and failed two or more of the required curriculum subject areas, unless the student's principal and teachers of any failed subject areas agree the student is academically prepared for the next grade level.	1



7. Fiscal (7 points possible)

Item	Description	Points Possible
308	School follows all guidelines and timely submitted complete and accurate EMIS data, using a software package certified by ODE. Each fiscal officer appointed under ORC 3314.011 is responsible for annually reporting the community school's data under ORC 3301.0714.	1
502	School that receives funding under Title I maintains the required level of expenditures on an annual basis as outlined in federal regulations.	1
503	School reports all financial information in an easily understood format and by the reporting categories and subgroups required by ODE.	1
504	Annually, school provides a financial plan detailing an estimated budget and the per pupil expenditures.	1
506	School has filed annual financial reports with the Auditor of State that are prepared using generally accepted accounting principles.	1
509	School has liability insurance sufficient to cover any risks to the school.	1
Audit	Audit of school is devoid of significant findings and conditions, material weaknesses, or significant internal control weaknesses; no ongoing concerns.	1



8. Site Visit (8 points possible)

Item	Description	Points Possible
Fall Site Visit	On its Fall Comprehensive Site Visit, school cooperates with observations/focus groups; does not require a return site visit on special education; does not require a follow-up enrollment record review; and has fewer than three items of concern on its walkthrough.	4
Spring Site Visit	On its Spring Comprehensive Site Visit, school cooperates with observations/focus groups; does not require a return site visit on special education; does not require a follow-up enrollment record review; and has fewer than three items of concern on its walkthrough.	4

9. Other (9 points possible)

Item	Description	Points Possible
Other ODE requirements	School complies with any items included in latest annually updated ODE School Compliance worksheet, available online at http://education.ohio.gov/Topics/Community-Schools , but not listed elsewhere in this Organizational Performance Framework.	5
Corrective Action Plans	School has not had to develop and implement a corrective action plan.	2
Intervention Protocol	School has never required sponsor intervention under the Intervention Protocol.	2



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A CMSD Communications Publication

December/January 2023-24

CMSD SponsorShip



A newsletter for CMSD-sponsored community schools

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More information on CMSD's community school sponsorship and other collaborative initiatives related to community schools in Cleveland is available on the CMSD website, [ClevelandMetroSchools.org](https://www.clevelandmetroschools.org), by clicking on the "Schools" tab on the main menu and then on "CMSD/Charter School Collaboration."



Happy Holidays!

The fall has been a busy time for us, and we recently completed all of our fall site visits. As a reminder, these include a special education file audit, a student file review, a compliance and building review, and classroom observations. We appreciate how easy your building leaders have made these for us and hope the information we have shared with them has been valuable.

At the end of November, we also released our annual sponsorship report that was submitted to ODE. We will be sharing these ahead of your December board meetings.

In addition, three sponsored schools have been going through the renewal process. For these schools we will also be sharing renewal recommendations.

We will be reviewing site visits, annual reports, and renewal reports at your December board meetings. Thank you for giving us extra time for this!

Thank you for choosing CMSD as your sponsor, and best wishes for a wonderful holiday season! We hope you all get a chance to relax and enjoy friends and family before we are busy with the rest of the school year.



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Upcoming Events



PROFESSIONAL LEARNING

Data Based Decision Making for Adolescent Readers

Join the SST3 in learning effective ways to collect, analyze, and interpret your literacy screener, diagnostic, formative, and summative assessment data. Learn how to use your data to make informed instructional decisions, such as which tier of instruction would best meet your students' academic literacy needs. This professional development series is aimed at building teachers, instructional coaches, and administrators' capacity for Data-based Decision-making in adolescent literacy. Open to all grade 4-12 teachers, intervention specialists, principals, and instructional coaches.

Date: Wednesday, January 17, 2024

Time: 8:30 am – 12:00 pm

Location: ESC-NEO, 6393 Oak Tree Blvd., Independence, Ohio 44131

[Registration Link:](#)

Register by January 17, 2024

[Program Flier](#)

Making Your One Plan Work

Understanding the strategies and principles of the programs that are occurring within your school building or district is critical to achieving success. Learn how to apply Implementation Science to your current initiatives, regardless of how long they have been in use. The work of the National Implementation Research Network (NIRN) has been a foundation for school improvement throughout Ohio and Implementation Science over the past several years. The evidence-based strategies that will be shared are critical in developing systematic structures. This session will include tools and resources that you can begin implementing immediately to support your current structures. Open to district and building administrators and instructional coaches.

Date: Thursday, February 1, 2024

Time: 11:30 am – 3:00 pm

Location: ESC-NEO, 6393 Oak Tree Blvd., Independence, Ohio 44131

[Registration Link:](#)

Register by January 31, 2024

[Program Flier](#)

MORE EVENTS ON THE NEXT PAGE

Teacher Times

Nurturing Minds: The Importance of Leisurely Reading in Education

Dear Educators,

In the bustling world of academia, where schedules are tight and curriculum demands are high, it's essential to pause and reflect on the fundamental value of allowing scholars the time to leisurely immerse themselves in the world of books. Beyond the structured lessons and assessments, the act of unhurried reading plays a pivotal role in shaping well-rounded individuals.

Leisurely reading is not just a break from the routine; it is a powerful tool for cognitive development. When students engage in unhurried reading, they are not merely decoding words on a page but weaving a tapestry of comprehension, critical thinking, and imagination. This process transcends the boundaries of subject matter, fostering creativity and a love for learning that extends beyond the classroom.

In a society driven by rapid information consumption, cultivating the habit of leisurely reading equips scholars with the ability to delve deep into topics, nurturing a thirst for knowledge that lasts a lifetime. It builds resilience in the face of complex ideas and encourages independent thought, skills that are indispensable in an ever-evolving world.

Furthermore, the benefits of leisurely reading extend beyond academic achievement. It enhances vocabulary, cultivates empathy, and refines communication skills. As educators, we play a crucial role in fostering an environment that values the intrinsic worth of reading for pleasure, not just for academic pursuits.

In practical terms, consider allocating dedicated time for silent reading sessions in the classroom or encouraging students to explore books of their choice. Create cozy reading corners that beckon learners to escape into the realms of literature. By doing so, we send a powerful message: that leisurely reading is not a luxury but an integral part of intellectual and emotional development.

Let us champion the cause of leisurely reading, recognizing it as a cornerstone of education that goes beyond preparing students for exams. In providing time for scholars to lose themselves in the magic of books, we are nurturing thinkers, dreamers, and lifelong learners.

Here's to fostering a love for reading that transcends the pages of textbooks and paves the way for a future where curiosity knows no bounds.

A Forever Reader,

Lesley M. Wilkins-Valentine

Upcoming Events



IEP/ ETR Best Practices

This professional development is a 3-day series. We will discuss your current practices and brainstorm how teams can more effectively create, implement and monitor quality plans and practices that will lead to better outcomes for all students. Before attending on 2/6/2024, it is required that all participants review the State released IEP and ETR Universal Supports Modules for school-aged and preschool. Open to district or building internal monitoring teams (team members may include Director of Special Education or Pupil Services Administrator, building administrator, intervention specialist, related service providers (e.g., school psychologist, SLP, OT) general education teacher) or any other staff member your district has identified to be on the Internal Monitoring team.

Modules can be found on the ODE website at: <https://tinyurl.com/IEPETRModules>

2/6/2024: How to review special education documents and the connection between the ETR and the IEP.

3/5/2024: Prepare teams to build an internal monitoring system.

4/24/2024: Problem solve internal monitoring systems, revise procedures and practices and create tiered support for educators.

Dates: Tuesday, February 6, 2024

Tuesday, March 5, 2024

Wednesday, April 24, 2024

Time: 9:00 am – 3:30 pm

Location: ESC-NEO, 6393 Oak Tree Blvd., Independence, Ohio 44131

[Team Registration Link:](#)

(Please register each person separately)

Please contact Angie Chapple, angie.chapple@escneo.org if you want to register as an individual.

[Program Flier](#)



Legislative Update

ODE-DEW transition moves forward despite legal challenges

As previously reported, seven members of the State Board of Education filed a lawsuit challenging the overhaul of the Ohio Department of Education (ODE) and reassignment of most of the State Board's authority and responsibilities to the new Department of Education and Workforce (DEW) provided for in H.B. 33 passed by the General Assembly earlier this year.

An amended complaint was later filed by just two (rather than the original seven) State Board members, the Toledo City School District Board of Education, and a parent who previously served on the Toledo school board.

A temporary restraining order was put into place and extended before a judge denied the plaintiff's motion for a preliminary injunction saying that the plaintiffs failed to prove that they would suffer "immediate and irreparable harm" if an injunction was not issued. The plaintiffs have challenged the court's decision and attorneys representing the administration of Governor Mike DeWine have filed a motion to dismiss the case.

Although the state's attorneys say that the judge's ruling was "well-reasoned" and "correct," they have filed objections to two aspects: the finding that the plaintiffs would have standing if able to prove they would suffer injuries; and, the finding that provisions of legislation (H.B. 33) were read for "the first and only time" in the House on June 30.

As the legal sparring continues, Governor DeWine has made two important announcements: the appointment of ODE Chief of Staff Jessica Voltolini as interim director of the newly created Department of Education and Workforce; and, nomination of Steve Dackin as DEW director, subject to approval by the Senate.

MORE EVENTS ON THE NEXT PAGE

Upcoming Events



Strategies & Considerations: Responding to Challenging Behaviors

One-day professional development focused on classroom management ODE resources within a trauma-informed framework for supporting ALL students. This professional development offering will focus on empowering teachers and administrators to transform learning environments and make decisions using evidence-based strategies rooted in the neuroscience of trauma, cognition, behavior, and learning.

Date: Monday, February 26, 2024

Time: 9:00 am – 3:30 pm

Location: ESC-NEO, 6393 Oak Tree Blvd., Independence, Ohio 44131

[Registration Link](#)

[Program Flier](#)

Legislative Update

Dackin has extensive experience in the K-12 education sector, having served as a teacher, principal and administrator, as well as superintendent of school and community partnerships at Columbus State Community College. He also previously served as a member of the State Board of Education, resigning to become a candidate for state superintendent of public instruction. However, less than one month after assuming the position he resigned after concerns were raised about his role in the search process while serving on the State Board.

Once approved by the Senate, as is expected given general broad support for Dackin, it seems likely that the deputy directors of DEW's two divisions – Primary and Secondary Education, and Career-Technical Education – will soon be announced. The deputy director candidates are also subject to the approval of the Senate.

On November 21, DEW held a public meeting to update stakeholders on the transition and efforts to implement other K-12 education provisions of the state biennial budget bill (H.B. 33). Interim Superintendent Jessica Voltolini was joined by Chief Legal Counsel Tony Palmer, Chief of Budget and School Funding Aaron Rausch, and Director of Policy and Legislative Affairs Jennifer Stump. In addition to providing an update on the transition, the meeting featured presentations on implementation of provisions of H.B. 33 and an overview of the new process for vetting and implementing the agency's administrative rules.

Click here -- <https://www.ohiochannel.org/video/ohio-department-of-education-and-workforce-11-21-2023-public-meeting> -- to access a recording of the DEW meeting broadcast and archived on The Ohio Channel.

In related news, the State Board of Education has a new website -- <https://sboe.ohio.gov/> -- independent of DEW with tabs for key functions and programs: educator licensure, professional conduct, educator evaluations, Ohio Teacher of the Year, resident educator program, consistently high performing teacher, educator standards board, local professional development committees, master teacher, and Ohio assessment for educators.

Employees of the new DEW will maintain their previous email addresses which are uniform:

Firstname.Lastname@Education.Ohio.Gov. Former ODE employees who now work for the State Board can be emailed at Firstname.Lastname@SBOE.Ohio.Gov.

Citizens Academy Southeast leader thrives on Engagement

Talk with Citizens Leadership Academy Southeast Principal Brianna Crabtree for just a few minutes and you'll immediately pick up on her enthusiasm and commitment to students, families, teachers and staff. Her positive attitude is somewhat contagious and quite inspiring.

Crabtree grew up in New Orleans and attended Louisiana State University where she briefly majored in education before switching to political science. Her motivation? She saw social injustices and wanted to pursue a career that would allow her to be a part of addressing them.

After graduation, she took the LSAT and applied to law school, intending to pursue a career as an attorney. But a Teach For America recruiter reached out to her and was persistent in her follow-up. After her first interview, she began to think the two-year experience might be something she'd enjoy before pursuing a law degree. Several teachers at her high school were a part of TFA's teacher corps, so she connected with them to learn more about the program and their personal experiences with it.

"Within the first three months of my involvement with Teach For America, I knew this was for me," Crabtree said. "I taught social studies, which aligned with my interest in political science, and I quickly recognized that helping underserved students receive a relevant, engaging education was a great way to bring about much-needed social change."

Teach For America assigned her to work at E Prep Woodland Hills, which is part of Breakthrough Public Schools – a network of schools in Cleveland dedicated to providing students with an education that empowers them to lead lives of impact and opportunity. After completing her TFA assignment she remained with Breakthrough, continuing to teach social studies before later switching subjects to English language arts. She then served as dean of instruction for two years.

Crabtree is new to the principal role at Citizens Southeast where she is responsible for leading the team serving roughly 300 students in grades five through eight -- part of the school's K-8 program serving about 700 students.

"What really sets our school apart is the joy component," Crabtree said. "One of the highlights is our community meetings held for 45 minutes every Friday morning. Staff and students come together to talk about what it means to be a good citizen, to celebrate academic accomplishments and to recognize students for positive behavior."

For some, the best part of the weekly meetings is the community group games, like the recent staff vs. student

volleyball match. The positive energy is a key component of the school culture and helps create a sense of family.

"I was recently diagnosed with multiple sclerosis," Crabtree said. "When students asked about my absences, I shared my diagnosis with them. It helped them understand that we all face challenges. It was humanizing."

Now, when Crabtree engages with students – popping into classrooms and eating lunch with them – they ask how she's doing and encourage her to take good care of herself. In a way, her experience has encouraged students to demonstrate kindness and caring for others.

During a six-week period earlier this year, the school suffered two painful losses: a student passed away, and a staff member was murdered. Crabtree, her team and students supported one another in their grief, openly sharing their feelings.

"Our school is structured to push students to succeed – academically, behaviorally and emotionally," Crabtree said. "We focus on the mindset of those we employ ... it's important that they share our commitment to helping our students realize their full potential."

Crabtree sees students' parents and other family members as partners in the effort to help students succeed and encourages their participation.

"I've worked in education since 2015," Crabtree said. "I've never met a family that didn't care. It's our responsibility to give families the tools they need to help students succeed. And some of the best feedback I've received has come from parents."

The hardest part of the job for Crabtree is finding ways to navigate all the challenges teachers face, and to help them achieve a healthy work/life balance.

The best part of the job for Crabtree can be summed up in one word: engagement! Her engagement with students, staff and families – and seeing them engage with one another – creates an environment in which everyone can thrive, including Crabtree in her new leadership role.



Brianna Crabtree
Principal
Citizens Leadership
Academy Southeast

Coversheet

Advisory Council and FIGS Board Charges

Section: IV. Governance Advisory Council
Item: A. Advisory Council and FIGS Board Charges
Purpose: Discuss
Submitted by:
Related Material: Draft_-_Governance_Advisory_Council_12_4_23.docx
Draft_-_Facilities_Advisory_Council_12_4_23.docx
Draft_-_Education_Enrollment_Advisory_Council_12_4_23.docx
Draft_-_Finance_Advisory_Council_12_4_23.docx
Draft_-_Human_Resource_Advisory_Council_12_4_23.doc
Draft - Executive Committee 12_7_23.docx



PURPOSE OF THE GOVERNANCE ADVISORY COUNCIL:

The Governance Advisory Council serves to provide technical expertise, to offer unbiased and independent feedback, and to review, monitor, assess and provide pertinent information on matters pertaining to the Boards of Directors' structure(s), procedures, recruitment, nominations, orientation and training. The Council shall gather and review such information and provide reports, including all such gathered information, to each School's Board of Directors in a manner determined by each individual Board. Such information provided by the Council to the Board(s) and/or School leadership, is non-binding and only becomes effective upon approval by the Board. The Council serves all four entities in the Intergenerational network.

Appointments and Composition

- Each School's Board of Directors may make a recommendation of individuals (including Board Members and volunteers with appropriate expertise and/or experience) to voluntarily serve on the Council. However, each School's Board of Directors shall ensure that, at no point, a number of Board Members equal to or greater than that Board's majority serves on the Council or attends any Council meeting and/or participates in any Council deliberation or discussion including via electronic mail.
- The Council shall select a Council Chair and shall determine the number of members to serve on the Council.
- Vacancies may be filled by the remaining members of the Council as deemed necessary and appropriate by Council. However, Council shall ensure that, at no time, a number of Board Members equal to or greater than a majority of an individual School's Board of Directors serves on the Council.
- The Governance Advisory Council will meet at least quarterly throughout the year or as more often as the Council Chair determines necessary or appropriate.
- Agendas shall be circulated to all Council members at least 24-hours in advance of meetings and will be available to any Board Member upon request.

The goal for this Council is to assist with and develop consistency across the Intergenerational Educational Model and to promote policies and procedures that align and support shared accountability and sustainability across the Model. Specifically, the Governance Advisory Council, in consultation with the Director of Network Operations, Executive Director, and the strategic plan's goals and strategies shall undertake the following, and provide reports on, to the Boards:

WORK OF THE GOVERNANCE ADVISORY COUNCIL:

- Engage full membership of all four Boards.
- Assist with the development of Board recruitment needs and processes. Assist with the promotion and recruitment of diverse School Board members, Advisory Councils, and Friends of the Intergenerational Schools Board members.
- Review, and propose modifications to as needed or as appropriate, Board policies and structure and create a Board Member handbook.
Evaluate and make recommendations as appropriate, the charges and composition of Boards, their Committees, Advisory Councils and Task Forces.
- Coordinate the nomination of new Board Members and prepare the slate of new and existing Board Members for annual elections.
- Coordinate continuing education activities for Board Members as needed and based on Sponsor requirements.
- Recommend to the Intergenerational Schools' and Intergenerational Cleveland Boards, general governing policies that do not fall under any other active Advisory Council (Education, Finance, etc.).
- In conjunction with Executive Committee, assist with each School's compliance with Sponsor requirements .
- Assist with the completion of the annually comprehensive CEO evaluation that includes a CEO self-evaluation, input from the School's Boards, and anonymous input from the CEO's direct reports.
- Review and recommend updates and revisions to the Code of Regulations as appropriate and necessary to support consistency among the three Intergenerational Schools and compatibility with Intergenerational Cleveland.
- Make recommendations to the three schools which promote integrity and consistency regarding the Intergenerational Schools Model.
- Develop responsibilities for Officer and Board Member roles and ensure that expectations are clearly communicated to by all Board members annually.
- In conjunction with the Executive Committee, coordinate planning for Board officer and committee leadership succession.
- Develop a training plan for all Board Members, including an orientation plan for new Board Members.
- By October of each year, prepare an annual calendar of Council priorities and meeting dates that can be included in the Intergenerational Schools' master board planning calendar.
- Assist each School's Board with creating specific measurable board-level goals for the year as part of the full board planning process.
- Annually evaluate its work as a Council and the objectives it has committed itself to and report on same to each individual Board of Directors.

DISCUSSION TOPICS FOR UPCOMING ADVISORY GROUP MEETINGS

Advisory Group Meeting	Required Business	Topics of Discussion	Who is Responsible



Draft 12/04/23

The Intergenerational Schools
Facilities Advisory Council Planning Grid

PURPOSE OF THE FACILITIES ADVISORY COUNCIL:

The Facilities Advisory Council supports leadership in matters pertaining to the School’s buildings, facilities, and related relationships. The Council shall gather and review such information and provide reports, including all such gathered information, to each School’s Board of Directors in a manner determined by each individual Board. Such information provided by the Council to the Board(s) or School leadership is non-binding and only becomes effective upon approval by the Board.

- Each School’s Board of Directors may make a recommendation of individuals (including Board Members and volunteers with appropriate expertise and/or experience) to voluntarily serve on the Council. However, each School’s Board of Directors shall ensure that, at no point, a number of Board Members equal to or greater than that Board’s majority serves on the Council or attends any Council meeting and/or participates in any Council deliberation or discussion including via electronic mail.
- The Council shall select a Council Chair and shall determine the number of members to serve on the Council.
- Vacancies may be filled by the remaining members of the Council as deemed necessary and appropriate by Council. However, Council shall ensure that, at no time, a number of Board Members equal to or greater than a majority of an individual School’s Board of Directors serves on the Council.
- The Facilities Advisory Council meets 2-4 times per year or as more often as the Council Chair determines necessary or appropriate.
- Agendas for Council meetings shall be circulated to all Council members at least 24-hours in advance of meetings and will be available to any Board Member upon request.

In coordination with the Director of Network Facilities & Safety and Executive Director, the Facilities Advisory Council shall gather information and provide reports on the following:

WORK OF THE FACILITIES ADVISORY COUNCIL:

- Provide information regarding facilities and/or maintenance issues or options.
- Review the long term Facilities Master Plan to identify barriers which would prohibit the School to meet the educational model structure determined by the Board-approved Educational Plan (Goal 1.1 in the Board-approved Strategic Plan.)
- Assist the Executive Director and/or the Director of Network Facilities & Safety with respect to review of lease negotiations and renewals and other agreements related to the School’s facilities.
- Support staff in enhancing and implementing a comprehensive safety plan.
- Investigate complaints and concerns regarding safety and security issues regarding both the actual facilities and the immediately adjacent neighborhoods.
- Annually evaluate its work as a Council and the objectives it has committed itself to and report on same to the Board
- Review reports/updates related to the operations, repairs and/or renovations of the School’s facilities provided to the Board by staff.
- Work with staff to address concerns that arise with respect to School facilities and landlord relationships as directed by that School’s Board of Directors.
- Evaluate the School’s need for space and investigate available options when additional space is needed or made available for possible future options.
- By October of each year, prepare an annual calendar of committee priorities and meeting dates that can be included in the Intergenerational Schools’ master board planning calendar.

DISCUSSION TOPICS FOR UPCOMING ADVISORY COUNCIL MEETINGS

Advisory COUNCIL Meeting	Required Business	Topics of Discussion	Who is Responsible

Advisory COUNCIL Meeting	Required Business	Topics of Discussion	Who is Responsible

Procedures

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PURPOSE OF THE EDUCATION/ENROLLMENT ADVISORY COUNCIL:

The Education/Enrollment Advisory Council serves to provide technical expertise, to offer unbiased and independent feedback, and to review, monitor, assess and provide pertinent information on matters pertaining to the Model's educational program, student academic growth and achievement, teacher professional development, enrollment, and related items. The Council shall gather and review such information and provide reports, including all such gathered information, to each School's Board of Directors in a manner determined by each individual Board. Such information provided by the Council to the Board(s) and/or School leadership is non-binding and only becomes effective upon approval by the Board. The Council serves all three schools in the Intergenerational network.

Appointments and Composition

- Each School's Board of Directors may make a recommendation of individuals (including Board Members and volunteers with appropriate expertise and/or experience) to voluntarily serve on the Council. However, each School's Board of Directors shall ensure that, at no point, a number of Board Members equal to or greater than that Board's majority serves on the Council or attends any Council meeting and/or participates in any Council deliberation or discussion including via electronic mail.
- The Council shall select a Council Chair and shall determine the number of members to serve on the Council.
- Vacancies may be filled by the remaining members of the Council as deemed necessary and appropriate by Council. However, Council shall ensure that, at no time, a number of Board Members equal to or greater than a majority of an individual School's Board of Directors serves on the Council.
- The Education/Enrollment Advisory Council will meet monthly, or such other regular intervals determined appropriate by the Council, or upon request from a School's Board.
- Agendas shall be circulated to all Council members at least 24-hours in advance of meetings and will be available to any Board Member upon request.

Specifically, the Education/Enrollment Advisory Council, in consultation with the Executive Director, School Principals, and the strategic plan's goals and strategies shall undertake the following, and provide reports on, to the Boards regarding:

WORK OF THE EDUCATION/ENROLLMENT ADVISORY COUNCIL:

- Support of educational and enrollment policy review and provide guidance around revision of these policies (including annual revision of the Family Handbook).
- Assist in determining and reinforcing the foundational tenets of the educational model (also referred to as the Educational Plan) with regard to instruction and curriculum (Responsive Classroom and adopted ELA and Math) within the IG Schools.
- Assist Model and School leaders in deepening the integration of developmental/multi-age classroom individualization and engagement into the core of teaching and learning for every student and every teacher.
- Assist Model and School leaders in developing structures and supports for mastery-based, developmental learning, and reporting on student progress.
- Support School leadership by reviewing and analyzing proposed educational/curricular changes in one or more of the IG Schools.
- Review any issues of noncompliance with School leadership as well as any corrective action plans.
- Recommend Board training(s) on issues related to academic oversight and academic achievement, as appropriate or as asked by a School's Board.
- Annually evaluate its work as a committee and the objectives it has committed itself to and report on same to the Boards.
- Assist School leadership in performing data analysis and reporting to full Boards on internal and external education and performance metrics & provide relevant feedback to Schools on improvement in this area. (documenting and communicating the value of the IG education).
- Help Model and School leaders to develop educational and academic goals for the upcoming academic year.
- Assist with the implementation of evaluation systems that measure success in Lifelong Learning, Community Involvement, Multi-Age Engagement, and Spirited Citizenship.
- Assist in determining enrollment targets each year.
- By October of each year, prepare an annual calendar of priorities and meeting dates that can be included in the Intergenerational Schools' master board planning calendar.
- Track indicators in the current Strategic Plan related to student experience and staff development. Report on progress toward stated goals.

DISCUSSION TOPICS FOR UPCOMING ADVISORY COUNCIL MEETINGS

Advisory Council Meeting	Required Business	Topics of Discussion	Who is Responsible

Procedures



PURPOSE OF THE FINANCE ADVISORY COUNCIL:

The Finance Advisory Council supports leadership with regard to the financial resources, performance, and prospects of the schools and Intergenerational Cleveland in accordance with the financial policies and network goals. The Council shall gather and review appropriate information and provide reports, including all such gathered information, to each School's Board of Directors in a manner determined by each individual Board. Such information provided by the Council to the Board(s) and Friends of the Intergenerational Schools and/or to School leadership is non-binding and only becomes effective upon approval by the individual Board.

- Each School's Board of Directors may make a recommendation of individuals (including Board Members and volunteers with appropriate expertise and/or experience) to voluntarily serve on the Council. However, each School's Board of Directors shall ensure that, at no point, a number of Board Members equal to or greater than that Board's majority serves on the Council or attends any Council meeting and/or participates in any Council deliberation or discussion including via electronic mail. Intergenerational Cleveland shall be permitted to have a member on Council at all times.
- The Council shall select a Council Chair and shall determine the number of members to serve on the Council.
 - Vacancies may be filled by the remaining members of the Council as deemed necessary and appropriate by Council. However, Council shall ensure that, at no time, a number of Board Members equal to or greater than a majority of an individual School's Board of Directors serves on the Council.
- The Council shall meet nine times per year, or as more often as the Council Chair determines necessary or appropriate.
- Agendas shall be circulated to all Council members at least 24-hours in advance of meetings and will be available to any Board Member upon request.

WORK OF THE FINANCE ADVISORY COUNCIL:

- Coordinate with the Executive Director on the preparation of the annual budgets
- Provide monthly financials reports for Board review.
- Assist with the development and review of internal financial controls.
- Provide investment options for the Boards.
- Assist with annual audits.
- At least each quarter (in October, January, April, and July), review updated financial projections for each school for the total school year and report back to each School's Board.
- Examine updated long-range financial projections (five or six years) for each school, as a basis for enrollment, staffing, salaries, and facilities planning. Twice a year (in May and October), examine five-year projections for submission to each school's sponsor, and the Ohio Department of Education and Workforce.
- Review the external audits for completion and potential issues, prepared by outside auditors for each school for the immediately preceding school year, prior to Board approval.
- Stay informed of Sponsor and State financial reporting requirements and provide oversight to ensure requirements are met.
- Support leadership in increasing financial sustainability consistent with Intergenerational Schools' mission and educational model, and without sacrificing quality.
- Ensure regular communication with each Board and integrated reporting on the financial modeling and projections of all four entities.
- In June of each year, examine the preliminary budgets of each of the schools, and Intergenerational Cleveland, for potential issues prior to Board approval.
- In October of each year, based on updated enrollment/attendance projections examine a revised school budget for potential issues prior to Board approval.
- By May 15th of each year, review the annual Form 990 submission to the IRS for potential issues prior to Board approval.
- By October of each year, prepare an annual calendar of Council priorities and meeting dates that can be included in the Intergenerational Schools' master board planning calendar.
- Evaluate the financial implications of decisions to be recommended to the Boards by other Advisory Councils, Committees or Task Forces, from the perspective of short and medium term "affordability".
 - Review and propose modification to the Intergenerational Schools' Boards, and the Intergenerational Cleveland Board, regarding financial policies.
 - Annually evaluate its work as a Council and the objectives it has committed itself to and report on same to the Board.

DISCUSSION TOPICS FOR UPCOMING ADVISORY GROUP MEETINGS

Advisory Group Meeting	Required Business	Topics of Discussion	Who is Responsible

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PURPOSE OF THE HUMAN RESOURCES ADVISORY COUNCIL:

The Human Resources Advisory Council serves to assist School leadership on matters pertaining to personnel administration and staffing. The Council shall gather and review information regarding such matters and provide reports, including all such gathered information, to each School's Board of Directors in a manner determined by each individual Board. Such information provided by the Council to the Board(s) and/or School leadership is non-binding and only becomes effective upon approval by the Board.

Appointments and Composition

- Each School's Board of Directors may make a recommendation of individuals (including Board Members and volunteers with appropriate expertise and/or experience) to voluntarily serve on the Council. However, each School's Board of Directors shall ensure that, at no point, a number of Board Members equal to or greater than that Board's majority serves on the Council or attends any Council meeting and/or participates in any Council deliberation or discussion including via electronic mail.
- The Council shall select a Council Chair and shall determine the number of members to serve on the Council.
- Vacancies may be filled by the remaining members of the Council as deemed necessary and appropriate by Council. However, Council shall ensure that, at no time, a number of Board Members equal to or greater than a majority of an individual School's Board of Directors serves on the Council.
- The Human Resources Advisory Council will meet monthly, or such other regular intervals determined appropriate by the Council Chair, or upon request from a School's Board.
- Agendas shall be circulated to all Council members at least 24-hours in advance of meetings and will be available to any Board Member upon request.

Specifically, the Human Resources Advisory Council, in consultation with the Director of Network Human Resources, and the Executive Director, and following the strategic plan's goals and strategies shall undertake the following, and provide reports on to the Board:

WORK OF THE HUMAN RESOURCES ADVISORY COUNCIL (what we will accomplish/monitor):

- | | |
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| <ul style="list-style-type: none"> • Assist with the periodic review and update of the Compensation Plan, and projections for long range salary schedules. • Research benefits necessary to attract and retain quality staff and report to the Boards on options. • Provide overall policy compliance guidance to School leadership with respect to personnel matters, including matters related to diversity, inclusion and equity, talent management and development (includes succession planning), recruitment, and evaluation procedures. • Support leadership in establishing a systematic practice for recruiting new teachers, administrators, with attention to increasing diversity (gender, race/ethnicity, expertise, and community connections). • Assist leadership in formalizing a systematic and responsive teacher and staff onboarding, professional development, and evaluation approach that recognizes the varied needs of adult learners and serve as a resource to the Executive Director and Director of Education with respect to the staff evaluation process. • Review and report to the Boards on Human Resource policies compliance including recommending updates to the Staff Handbook. | <ul style="list-style-type: none"> • Assist with Board Investigation regarding personnel matters and disputes (such as those that arise between faculty and administrators) that are elevated to the Board level and report the results of such investigations to the Board. • Develop evaluation criteria and procedures and work in coordination with the Executive Committee for the Boards' annual performance review of the Executive Director. • If requested, gather information regarding the succession planning for the Executive Director position, and other key positions, and provide reports and options to the Boards. • By October of each year, prepare an annual calendar of Council priorities and meeting dates that can be included in the Intergenerational schools' master board planning calendar. |
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DISCUSSION TOPICS FOR UPCOMING ADVISORY GROUP MEETINGS

Advisory Group Meeting	Required Business	Topics of Discussion	Who is Responsible



PURPOSE OF THE EXECUTIVE COMMITTEE:

The Executive Committee is comprised of elected Officers of each School’s Board of Directors and shall assume the primary responsibility for supporting the Chair in the execution of his or her responsibilities. The Committee shall gather information and provide reports, as appropriate, to each School’s Board of Directors in a manner determined by each individual Board.

APPOINTMENTS AND COMPOSITION

The Executive Committee shall consist of elected Officers of each individual School’s Board of Directors in a number that shall not be equal to or greater than that School Board’s majority. The Committee shall select its Chair. Other Board Members may be invited to participate as appropriate, so long as no majority of that School’s Board is on the Committee at any time. However, as a committee of a public office, public meeting rules apply and must be adhered to during all Committee meetings, correspondence, and other deliberations or actions as appropriate. Members of the Executive Committee shall receive training on Ohio’s Open Meeting and Public Records laws.

The Executive Committee, in consultation with the Executive Director where appropriate, and following the Board Advisory Council Protocols, shall undertake the following work on behalf of the Boards:

WORK OF THE EXECUTIVE COMMITTEE :

- Advise on urgent or unscheduled matters that occur between regular board meetings. Refer such matters to the appropriate advisory council(s) or to the Board(s) as a whole.
- Assist Human Recourses Advisory Council in the annual review of the Executive Director. This process will include quarterly touch points with the Executive Director.
- In conjunction with the Governance Advisory Council, coordinate planning for Board, Officer and Advisory Council leadership succession.
- Annually evaluate its work as a committee and the objectives it has committed itself to and report on same to the Board of Directors.
- Assist the Executive Director in the periodic review of the Intergenerational Cleveland (dba as Friends of the Intergenerational Schools) supporting agreement and any other formal legal agreements between the Intergenerational schools.
- Ensure that the work of any Advisory Council without a chair continues.
- Ensure all Schools’ sponsor contracts are in good standing and assist with sponsor contract negotiations.

DISCUSSION TOPICS FOR UPCOMING ADVISORY GROUP MEETINGS

Advisory Group Meeting	Required Business	Topics of Discussion	Who is Responsible

Procedures

Committee meetings are open to the public and shall be announced publicly. The Committee may not act on behalf of the Boards. The Committee shall provide each School’s Board with reports, as appropriate, in a manner determined by that Board.

- Agendas shall be circulated to all Committee members in advance of meetings and will be available to any School Board Member as requested.
- Executive Committee meets as determined by the Committee or as may be requested by one of the Boards of Directors.

Coversheet

Approval of October and November Financials

Section: VII. Finance
Item: A. Approval of October and November Financials
Purpose: Vote
Submitted by:
Related Material: IG Network - Oct'23 Financial Summary.pdf
LIS - Oct'23 Financial Report.pdf
TIS - Oct'23 Financial Report.pdf
IGC - Oct'24 Financial Report.pdf
NWIS - Oct'23 Financial Report.pdf
TIS - Nov'24 Financial Report.pdf
NWIS - Nov'24 Financial Report.pdf
LIS - Nov'24 Financial Report.pdf
IGC - Nov'24 Financial Report.pdf
IG Network - Nov'23 Financial Summary.pdf



Financial Report – October 2023

Key Financials (in \$000s)	Schools Total	TIS	NWIS	LIS		IGC
YTD Core Program Net Income	+\$684	+\$169	+\$279	+\$236		(\$101)
Projected FY24 Core Program Net Income	+58	(2)	(90)	+150		(106)
Projected FY24 Core Program Budget Variance	(1,019)	(931)	+11	(99)		(12)
Month-End Cash Balance	+8,135	+2,011	+4,298	+1,825		+1,051
Unrestricted Net Assets	+\$6,738	+\$1,850	+\$3,339	+\$1,550		+\$1,216

Fiscal Health Benchmarks		CMSD Standard	TIS	NWIS	LIS		IGC
Liquidity Ratio Index	$\frac{\text{Current Assets}}{\text{Current Liabilities}}$	1.0 to 1.1	6.89	4.56	5.71		115.71
Operating Cash Ratio	$\frac{\text{Total Cash}}{\text{Avg. Monthly Exp.}}$	1.0 to 2.0 Months Cash	6.21 months	14.94 months	8.56 months		17.28 months
Reserve Ratio Index	$\frac{\text{Fund Balance}}{\text{Avg. Monthly Exp.}}$	0.40 to 0.75	5.71 months	11.6 months	7.27 months		19.99 months
October 2023 FTE Variance	$\frac{\text{Actual FTE}}{\text{Budgeted FTE}}$	90.0%-94.9% of Budget	89.4%	88.6%	82.5%		---

Note: Fund Balance is equal to Unrestricted Net Assets plus Net income

IG Finance Advisory Committee Notes

- FY24 Network Projections

The chart below provides the projected core program and the extraordinary revenues/expenses for TIS, NWIS, LIS and IGC for Fiscal Year 2024. Total FY24 core program revenues for all three schools are projected to be \$8,619,119 while core program expenses are projected to be \$8,561,415. After extraordinary items and ESSER funds are included, the combined year-end core program surplus is projected to be \$1,873,650. A detailed budget-to-actual analysis is included within each organization's Monthly Financial Report.

- Planning for Fiscal Year 2025

With the 2023-2024 school year underway, it is imperative to look ahead to the 2024-2025 school year. Establishing board priorities and goals in student learning growth, enrollment, finance, facilities, technology, etc. will help in creating a school plan for the 2024-2025 school year that is aligned to the school's long-term vision.

- Fall Reports Budget Update

The charts in this report four have been updated to include amounts from the October 2023 board-approved Five-Year Forecast. All budget variances are updated to be based off of the current budgeted revenues and expenses.

Board Action Items

- 1) Continue discussions related to the need to ramp up philanthropic support.



Financial Report – October 2023

FY23 Projection

The chart below provides the projected core program and the extraordinary revenues/expenses for TIS, NWIS, LIS and IGC for Fiscal Year 2024. Total FY24 core program revenues for all three schools are projected to be \$8,619,119 while core program expenses are projected to be \$8,561,415. After extraordinary items and ESSER funds are included, the combined year-end core program surplus is projected to be \$1,873,650. A detailed budget-to-actual analysis is included within each organization's Monthly Financial Report.

Model Rollup (1)	TIS	NWIS	LIS	Total	IGC
FTE ENROLLMENT (2)	217.00	228.00	144.00	589.00	
REVENUE					
State Foundation (excl SPED) (3)	\$ 1,845,331	\$ 1,984,180	\$ 1,175,640	\$ 5,005,151	\$ -
CCIP Funding (excl Title VI-B)	183,531	136,834	131,449	451,813	-
Facilities Funding	217,000	238,000	120,000	575,000	-
Property Tax Levy	-	178,288	204,485	382,773	-
Casino	19,322	17,827	18,870	56,020	-
Charter School Equity Supplement	141,050	152,320	78,000	371,370	-
BASE REVENUE	2,406,234	2,707,449	1,728,444	6,842,126	-
State Foundation SPED (3)	262,611	223,526	193,083	679,220	-
Title VI-B	50,696	58,133	42,695	151,524	-
Food Funding	158,411	102,039	141,351	401,801	-
Other Revenues	173,897	236,532	134,019	544,448	623,918
OTHER REVENUE	645,614	620,230	511,148	1,776,993	623,918
TOTAL REVENUE	3,051,848	3,327,679	2,239,592	8,619,119	623,918
EXPENSES					
Instruction Staff	\$ (1,036,428)	\$ (1,914,524)	\$ (697,290)	\$ (3,648,242)	\$ -
Admin/Ops Staff	(515,628)	(552,898)	(428,528)	(1,497,055)	(56,311)
Purchased Services - Food	(158,411)	(115,860)	(142,000)	(416,271)	-
Purchased Services - Special Education	(180,974)	(287,834)	(94,700)	(563,508)	-
Purchased Services - Facilities	(343,400)	(157,007)	(112,601)	(613,007)	-
Purchased Services - Consulting	(287,839)	(145,574)	(251,243)	(684,656)	(311,071)
Purchased Services - Other	(263,038)	(148,068)	(162,627)	(573,732)	-
Supplies	(195,289)	(82,410)	(168,360)	(446,059)	(23,223)
Other Expenses	(72,758)	(13,502)	(32,625)	(118,884)	(9,312)
TOTAL EXPENSES	(3,053,765)	(3,417,676)	(2,089,974)	(8,561,415)	(399,917)
CORE PROGRAM SURPLUS/(DEFICIT)	\$ (1,917)	\$ (89,998)	\$ 149,618	\$ 57,704	\$ 224,001
EXTRAORDINARY REVENUE & EXPENSES					
Rent & Mortgage	(74,842)	(35,000)	(220,000)	(329,842)	-
Facilities & Equipment	-	-	-	-	-
IGC Base Support (4)	74,842	35,000	220,000	329,842	(330,000)
HQ School Funding	651,000	639,630	526,530	1,817,160	-
SURPLUS/(DEFICIT) after extraordinary	\$ 649,083	\$ 549,632	\$ 676,148	\$ 1,874,864	\$ (105,999)
ESSER Revenues	758,703	-	245,495	1,004,198	-
ESSER Expenses	(757,275)	-	(248,136)	(1,005,411)	-
SURPLUS/DEFICIT after ESSER	\$ 650,510	\$ 538,143	\$ 673,508	\$ 1,873,650	\$ (105,999)
PER STUDENT REVENUES	\$ 14,064	\$ 14,595	\$ 15,553	\$ 14,633	
PER STUDENT EXPENSES	\$ (14,073)	\$ (14,990)	\$ (14,514)	\$ (14,536)	

Notes

- 1 Projections include FY24 accruals projected to be paid after 06/30/24.
- 2 Projected Enrollment is based on school expected year-end FTE
- 3 Projected state foundation revenue reflects currently school year October FTEs
- 4 Projected FY24 IGC Donations are based upon contributions toward FY24 Rent & Mortgage, Facilities & Equipment

The information in this report is based upon pre-audit accounting to facilitate ongoing financial management and planning.



Financial Report – October 2023

Equity Position

The chart below outlines the balance sheet totals based upon current accounting records. All of the information in this financial report is based upon pre-audit estimates using available information as of November 15, 2023. GASB 68 pension liability entries are not included in this Balance Sheet Summary as they are not a legal liability for the School. This information should not be used for official financial analysis or reporting. It is provided solely for the use of the Board and Administration to facilitate future financial planning.

**The Intergenerational Schools
Balance Sheet Summary
October 31, 2023**

ASSETS	TIS	NWIS	LIS	Total	IGC
Current Assets					
Cash (1)	\$ 2,011,271	\$ 4,298,243	\$ 1,825,210	\$ 8,134,724	\$ 1,050,883
Accounts Receivable	146,225	32,667	89,564	268,455	175,406
Intranetwork Receivable	10,880	-	-	10,880	-
Other Current Assets	-	-	-	-	-
Total Current Assets	2,168,376	4,330,910	1,914,773	8,414,059	1,226,289
Non-Current Assets					
Capital Assets, net	1,263,417	37,121	-	1,300,538	72
Other Non-Current Assets	-	-	-	-	-
Total Non-Current Assets	1,263,417	37,121	-	1,300,538	72
TOTAL ASSETS	\$ 3,431,792	\$ 4,368,032	\$ 1,914,773	\$ 9,714,597	\$ 1,226,361
LIABILITIES					
Current Liabilities					
Accounts Payable	197,860	812,378	256,535	\$ 1,266,773	2,750
Wages and Benefits Payable (2)	80,381	138,150	79,001	297,533	7,848
Other Current Liabilities	36,286	-	-	36,286	-
Total Current Liabilities	314,527	950,528	335,536	1,600,591	10,598
Non-Current Liabilities					
Loan Payable	883,166	-	-	883,166	-
Capital Lease Payable	-	-	-	-	-
Total Non-Current Liabilities	883,166	-	-	883,166	-
TOTAL LIABILITIES	\$ 1,197,693	\$ 950,528	\$ 335,536	\$ 2,483,757	\$ 10,598
NET EQUITY					
Net Assets (3)					
Temp. Restricted - Capital	343,965	37,121	-	381,086	72
Other Restricted	39,884	41,739	29,672	111,295	-
Unrestricted Net Assets	1,850,250	3,338,644	1,549,565	6,738,459	1,215,691
TOTAL NET ASSETS (4)	2,234,099	3,417,504	1,579,238	7,230,840	1,215,763
TOTAL LIABILITIES AND NET ASSETS	\$ 3,431,792	\$ 4,368,032	\$ 1,914,773	\$ 9,714,597	\$ 1,226,361

Notes

- 1 Cash balances are based upon reconciled bank statements.
- 2 Wage and Benefits Obligations include stretch pay for staff and payroll tax liabilities.
- 3 Net Assets do not include GASB 68 pension liabilities since they are not a legal responsibility of the School.
- 4 Total Net Assets are preliminary estimates based upon pre-audit financial information.

The information in this report is based upon pre-audit accounting to facilitate ongoing financial management and planning.



Financial Report – October 2023

Key Financials:

(in \$thousands)

o YTD Core Program Net Income	+\$236
o FY24 Core Program Projected Net Income	+\$150
o FY24 Core Program Projected Budget Variance	(\$99)
o Month-end Cash Balance	+\$1,825
o Unrestricted Net Assets	+\$1,550

Fiscal Health:

CMSD Benchmarks		CMSD Standard	LIS	Status
Liquidity Ratio Index	$\frac{\text{Current Assets}}{\text{Current Liabilities}}$	1.0 to 1.1	5.71	Exceeds
Operating Cash Ratio	$\frac{\text{Total Cash}}{\text{Avg. Monthly Exp.}}$	1.0 to 2.0 Months Cash	8.56 months	Exceeds
Reserve Ratio Index	$\frac{\text{Fund Balance}}{\text{Avg. Monthly Exp.}}$	0.40 to 0.75	7.27 months	Exceeds
FTE Variance - October 2023	$\frac{\text{Actual FTE}}{\text{Budgeted FTE}}$	90.0%-94.9% of Budget	82.5%	Below

Note: Fund Balance is equal to Unrestricted Net Assets plus Net income.

Treasurer Notes:

o **FY24 Projection**

Lakeshore Intergenerational School's FY24 surplus through October was \$177,609. The year-end surplus is projected to be \$673,508 based upon anticipated receipts and disbursements. FY24 Core Program Receipts are projected to be \$2,239,592, an unfavorable (\$501,308) budget variance. The Core Program Expenses for FY24 are projected to be (\$2,089,974), a favorable \$402,399 budget variance. As a result, the projected FY24 core budget variance is an unfavorable (\$98.909) based upon current revenue and expense assumptions.

o **Planning for Fiscal Year 2025**

The planning for the 2024-2025 school year is underway. Establishing board priorities and goals in student learning growth, enrollment, finance, facilities, technology, etc. will help in creating a school plan for the 2024-2025 school year that is aligned to the school's long-term vision.

o **Fall Reports Budget Update**

The chart on page four has been updated to include amounts from the October 2023 board-approved Five-Year Forecast. All budget variances are updated to be based off of the current budgeted revenues and expenses.

Proposed Board Action Items:

- 1) Continue discussions related to the need to ramp up philanthropic support.

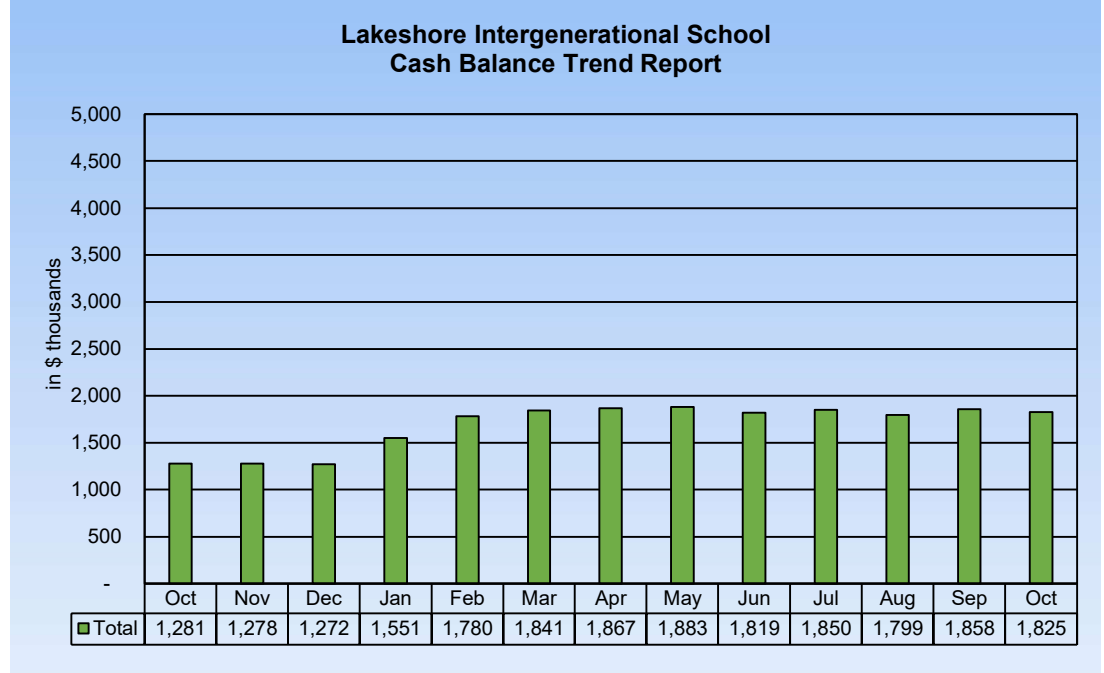


Financial Report – October 2023

Cash Position

The total cash balance for the Lakeshore Intergenerational School was \$1,825,210 at the end of October. Unrestricted Funds closed the month at \$1,915,712. The Restricted Funds closed the month at (\$90,502). Cash flow trend details for the past 13 months are provided on the chart below.

MONTH END CASH BALANCE DETAIL	
<i>Unrestricted Funds</i>	
General	\$ 2,275,807
Food	(97,595)
IGC Expense	(262,500)
Subtotal	\$ 1,915,712
<i>Restricted Funds</i>	
Parent Group	3,252
Wellness	14,420
Safety Grant	2,500
ARP IDEA	(12,063)
ESSER 3	(58,425)
MIS	(2,494)
Schoolwide	(30,583)
Athletic Fund	(5,180)
Title VI-B	(11,429)
Playground	9,500
Subtotal	\$ (90,502)
Total	\$ 1,825,210



Bank Reconciliation

The table below provides a summary of Lakeshore Intergenerational School reconciliation for the period ending October 31, 2023. The ending book balance was \$1,825,210. The ending bank statement balance was \$1,868,125. Outstanding checks (checks that have been sent, but not yet cashed) totaled \$42,915. Monthly interest from the STAR Ohio account was \$7,677.

Lakeshore Intergenerational School	
October 31, 2023	
Book Balance	
Beginning Book Balance	\$ 1,858,408
Ending Book Balance	\$ 1,825,210
Bank Balance	
Key Bank Balance	167,965
STAR Ohio Balance	1,700,159
Ending Bank Balance	\$ 1,868,125
Outstanding Checks	42,915
Reconciled Cash Balance	\$ 1,825,210

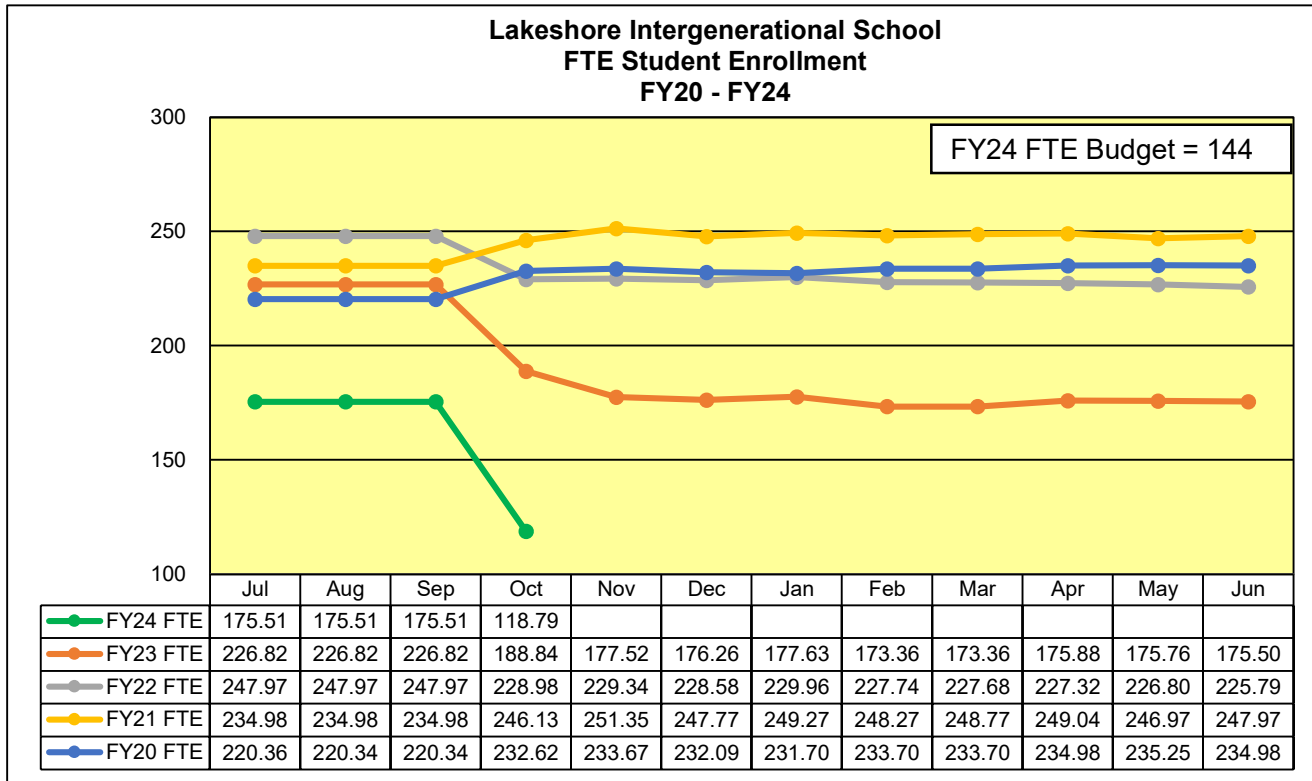
The information in this report is based upon pre-audit accounting to facilitate ongoing financial management and planning.



Financial Report – October 2023

Student Enrollment

The chart below provides a trend line summary of Full Time Equivalent (FTE) student enrollment. The October Foundation Report reflects the change in FTE's for the new school year. The FTE totals for subsequent months are based upon FTE student data as reported by the Ohio Department of Education through the monthly State Settlement reports. LIS enrollment was 118.79 in October, which is 25.21 FTE below budget.



Federal Programs

The chart below provides a summary of the Lakeshore Intergenerational School Consolidated Federal Programs (CCIP). Allocations are earmarked for salaries, benefits and professional development services. The CCIP allocation for FY24 is \$813,985. Disbursements have totaled \$192,188 year-to-date. Receipts have totaled \$91,750 year-to-date.

Lakeshore Intergenerational School CCIP - Federal Education Programs						
Federal Program	Schoolwide		IDEA-B		ESSER 3	Totals
FY24 Allocation	\$ 525,795		\$ 42,695		\$ 245,495	\$ 813,985
YTD Receipts	91,750		-		-	91,750
YTD Disbursements	122,334		11,429		58,425	192,188
Fund Balance	(30,583)		(11,429)		(58,425)	(100,438)
Encumbered Funds	403,462		38,821		189,710	631,993
Allocation Balance	\$ (1)		\$ (7,555)		\$ (2,641)	\$ (10,196)

The information in this report is based upon pre-audit accounting to facilitate ongoing financial management and planning.



Financial Report – October 2023

FY24 Projection

Lakeshore Intergenerational School's FY24 surplus through October was \$177,609. The year-end surplus is projected to be \$673,508 based upon anticipated receipts and disbursements. FY24 Core Program Receipts are projected to be \$2,239,592, an unfavorable (\$501,308) budget variance. The Core Program Expenses for FY24 are projected to be (\$2,089,974), a favorable \$402,399 budget variance. As a result, the projected FY24 core budget variance is an unfavorable (\$98,909) based upon current revenue and expense assumptions.

	YTD Actual (1)	FY24 Projection (2)	FY24 Act + Proj	FY24 Budget (3)	Budget Variance
FTE ENROLLMENT (4)	118.79	25.21	144.00	144.00	0.00
REVENUE					
State Foundation (excl SPED)	\$ 605,226	\$ 570,414	\$ 1,175,640	\$ 1,410,768	\$ (235,128)
CCIP Funding (excl Title VI-B) (5)	-	131,449	131,449	627,219	(495,770)
Facilities Funding	-	120,000	120,000	-	120,000
Property Tax Levy	81,083	123,402	204,485	204,485	-
Casino	5,621	13,249	18,870	18,870	-
Charter School Equity Supplement	-	78,000	78,000	93,600	(15,600)
BASE REVENUE	691,929	1,036,515	1,728,444	2,354,942	(626,498)
State Foundation SPED	-	193,083	193,083	193,083	-
Title VI-B	-	42,695	42,695	47,234	(4,539)
Food Funding	9,624	131,727	141,351	141,351	-
Other Revenues(6)	44,673	89,346	134,019	4,291	129,728
OTHER REVENUE	54,297	456,851	511,148	385,959	125,190
TOTAL REVENUE	746,226	1,493,366	2,239,592	2,740,901	(501,308)
EXPENSES					
Instruction Staff (7)	\$ (137,096)	\$ (560,194)	\$ (697,290)	\$ (1,007,119)	\$ 309,829
Admin/Ops Staff (7)	(114,535)	(313,993)	(428,528)	(558,365)	129,838
Purchased Services - Food	(16,256)	(125,744)	(125,744)	(142,000)	-
Purchased Services - Special Education	(19,562)	(75,138)	(94,700)	(94,700)	-
Purchased Services - Facilities	(25,400)	(87,201)	(112,601)	(87,900)	(24,701)
Purchased Services - Consulting	(56,291)	(194,952)	(251,243)	(241,776)	(9,467)
Purchased Services - Other	(33,649)	(128,978)	(162,627)	(162,374)	(253)
Supplies	(24,649)	(143,710)	(168,360)	(167,464)	(896)
Other Expenses	(12,754)	(19,872)	(32,625)	(30,675)	(1,950)
TOTAL EXPENSES	(440,192)	(1,649,782)	(2,089,974)	(2,492,373)	402,399
SURPLUS/DEFICIT	\$ 306,034	\$ (156,416)	\$ 149,618	\$ 248,527	\$ (98,909)
EXTRAORDINARY REVENUE & EXPENSES					
Rent	(70,000)	(150,000)	(220,000)	(220,000)	-
Facilities & Equipment	-	-	-	-	-
IGC Base Support	-	220,000	220,000	220,000	-
HQ School Funding	-	526,530	526,530	526,530	-
SURPLUS/DEFICIT incl Extraordinary Items	\$ 236,034	\$ 440,114	\$ 676,148	\$ 775,057	\$ (98,909)
ESSER Revenues	-	245,495	245,495	245,495	-
ESSER Expenses	(58,425)	(189,710)	(248,136)	(159,512)	(88,624)
SURPLUS/DEFICIT incl ESSER	\$ 177,609	\$ 495,899	\$ 673,508	\$ 861,040	\$ (187,533)

Notes

- 1 YTD Actuals are cash transactions for FY24 activities for the period of 07/01/23 to 10/31/23 (excludes FY23 activity).
- 2 FY24 Projections are anticipated cash transactions for remaining FY24 activity (includes FY24 accruals to be paid/rec'd after 06/30/24).
- 3 FY24 Budget based upon the approved October approved budget.
- 4 Projected enrollment is based on the expected enrollment of the school.
- 5 Projected CCIP revenue shortfall is due to actual allocations from ODE
- 6 Projected Other Revenue variance is due to STAR Ohio Interest over original estimates
- 7 Staffing budget variance is due to positions which were eliminated given current enrollment

The information in this report is based upon pre-audit accounting to facilitate ongoing financial management and planning.



Financial Report – October 2023

Equity Position

The chart below outlines the balance sheet totals for the current and prior year months. All of the information in this financial report is based upon pre-audit estimates using available information as of November 21, 2023. GASB 68 pension liability entries are not included in this Balance Sheet Summary as they are not a legal liability for the School. This information should not be used for official financial analysis or reporting. It is provided solely for the use of the Board and Administration to facilitate future financial planning.

**Lakeshore Intergenerational School
Balance Sheet Summary
October 2023 and October 2022**

ASSETS	10/31/2023	10/31/2022	\$ Change
Current Assets			
Cash	\$ 1,825,210	\$ 1,280,616	\$ 544,594
Accounts Receivable (1)	89,564	150,044	(60,480)
IGC Receivable	-	-	-
Other Current Assets	-	-	-
Total Current Assets	1,914,773	1,430,660	484,113
Non-Current Assets			
Capital Assets, net	-	-	-
Other Non-Current Assets	-	-	-
Total Non-Current Assets	-	-	-
TOTAL ASSETS	\$ 1,914,773	\$ 1,430,660	\$ 484,113
LIABILITIES			
Current Liabilities			
Accounts Payable	256,535	262,112	(5,577)
Wages & Benefits Payable (2)	79,001	70,936	8,065
Loan Payable	-	-	-
Total Current Liabilities	335,536	333,048	2,488
Non-Current Liabilities			
Note Payable	-	-	-
Other Non-Current Liabilities	-	-	-
Total Non-Current Liabilities	-	-	-
TOTAL LIABILITIES	\$ 335,536	\$ 333,048	\$ 2,488
NET EQUITY			
Net Assets			
Invested in Capital Assets, net	-	-	-
Restricted	29,672	58,898	(29,226)
Unrestricted	1,549,565	1,038,714	510,851
TOTAL NET ASSETS (3)	1,579,238	1,097,612	481,626
TOTAL LIABILITIES & NET ASSETS	\$ 1,914,773	\$ 1,430,660	\$ 484,113

Notes

- 1 Accounts Receivables include CCIP/Title reimbursements.
- 2 Wage and Benefits Obligations include stretch pay for teachers and payroll tax liabilities.
- 3 Total Net Assets are preliminary estimates based upon pre-audit financial information

The information in this report is based upon pre-audit accounting to facilitate ongoing financial management and planning.



Financial Report – October 2023

Key Financials:

(in \$thousands)

- o YTD Core Program Net Income +\$169
- o FY24 Core Program Projected Net Income (\$2)
- o FY24 Core Program Projected Budget Variance (\$931)
- o Month-end Cash Balance +\$2,011
- o Unrestricted Net Assets +\$1,850

Fiscal Health:

CMSD Benchmarks		CMSD Standard	TIS	Status
Liquidity Ratio Index	$\frac{\text{Current Assets}}{\text{Current Liabilities}}$	1.0 to 1.1	6.89	Exceeds
Operating Cash Ratio	$\frac{\text{Total Cash}}{\text{Avg. Monthly Exp.}}$	1.0 to 2.0 Months Cash	6.21 months	Exceeds
Reserve Ratio Index	$\frac{\text{Fund Balance}}{\text{Avg. Monthly Exp.}}$	0.40 to 0.75	5.71 months	Exceeds
FTE Variance - October 2023	$\frac{\text{Actual FTE}}{\text{Budgeted FTE}}$	90.0%-94.9% of Budget	89.4%	Below

Note: Fund Balance is equal to Unrestricted Net Assets plus Net income.

Treasurer Notes:

o **FY24 Projection**

The Intergenerational School's FY24 surplus through October was \$33,909. The year-end surplus is projected to be \$650,510 based upon anticipated receipts and disbursements. FY24 Core Program Receipts are projected to be \$3,051,848, an unfavorable (\$947,421) budget variance. The Core Program Expenses for FY24 are projected to be (\$3,053,765), a favorable \$16,226 budget variance. As a result, the projected FY24 core budget variance is an unfavorable (\$931.195) based upon current revenue and expense assumptions.

o **Planning for Fiscal Year 2025**

The planning for the 2024-2025 school year is underway. Establishing board priorities and goals in student learning growth, enrollment, finance, facilities, technology, etc. will help in creating a school plan for the 2024-2025 school year that is aligned to the school's long-term vision.

o **Fall Reports Budget Update**

The chart on page four has been updated to include amounts from the October 2023 board-approved Five-Year Forecast. All budget variances are updated to be based off of the current budgeted revenues and expenses.

Proposed Board Action Items:

- 1) Continue discussions related to the need to ramp up philanthropic support.

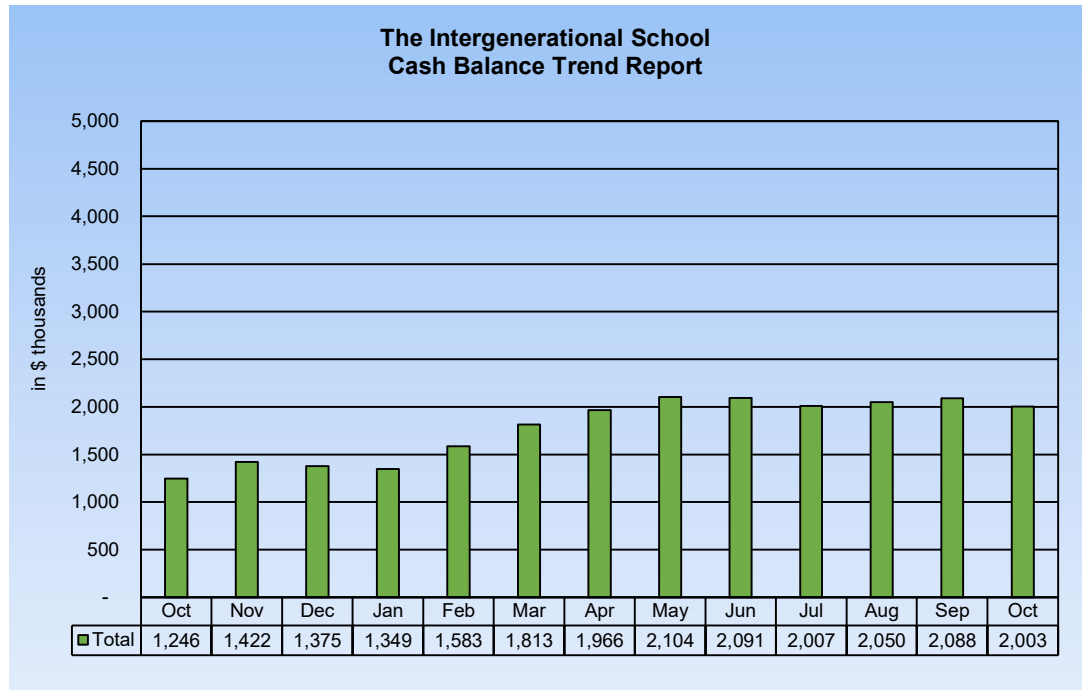


Financial Report – October 2023

Cash Position

The total cash balance for the The Intergenerational School was \$2,011,271 at the end of October. Unrestricted Funds closed the month at \$2,152,728. The Restricted Funds closed the month at (\$141,457). Cash flow trend details for the past 13 months are provided on the chart below.

MONTH END CASH BALANCE DETAIL	
Unrestricted Funds	
General	\$ 2,447,057
Food	(112,487)
IGC Expense	(181,842)
Subtotal	\$ 2,152,728
Restricted Funds	
Parent Group	\$ 4,067
St. Luke's Grant	370
Donate to Cancer	222
Sensory Room	210
Wellness	32,642
Flood Fund	-
Safety Grant	2,376
Title VI-B	(2,357)
ESSER III	(135,065)
Schoolwide	(35,210)
Athletic Fund	(8,712)
Subtotal	\$ (141,457)
Total	\$ 2,011,271



Bank Reconciliation

The table below provides a summary of The Intergenerational School reconciliation for the period ending October 31, 2023. The ending book balance was \$2,011,271. The ending bank statement balance was \$2,026,497. Outstanding checks (checks that have been sent, but not yet cashed) totaled \$15,226. Monthly interest from the STAR Ohio account was \$8,472.

The Intergenerational School October 31, 2023	
Book Balance	
Beginning Book Balance	\$ 2,002,753
Ending Book Balance	\$ 2,011,271
Bank Balance	
Key Bank Balance	137,955
Erie Bank Balance	5,256
STAR Ohio Balance	1,883,286
Ending Bank Balance	\$ 2,026,497
Outstanding Checks & Deposits	15,226
Reconciled Cash Balance	\$ 2,011,271

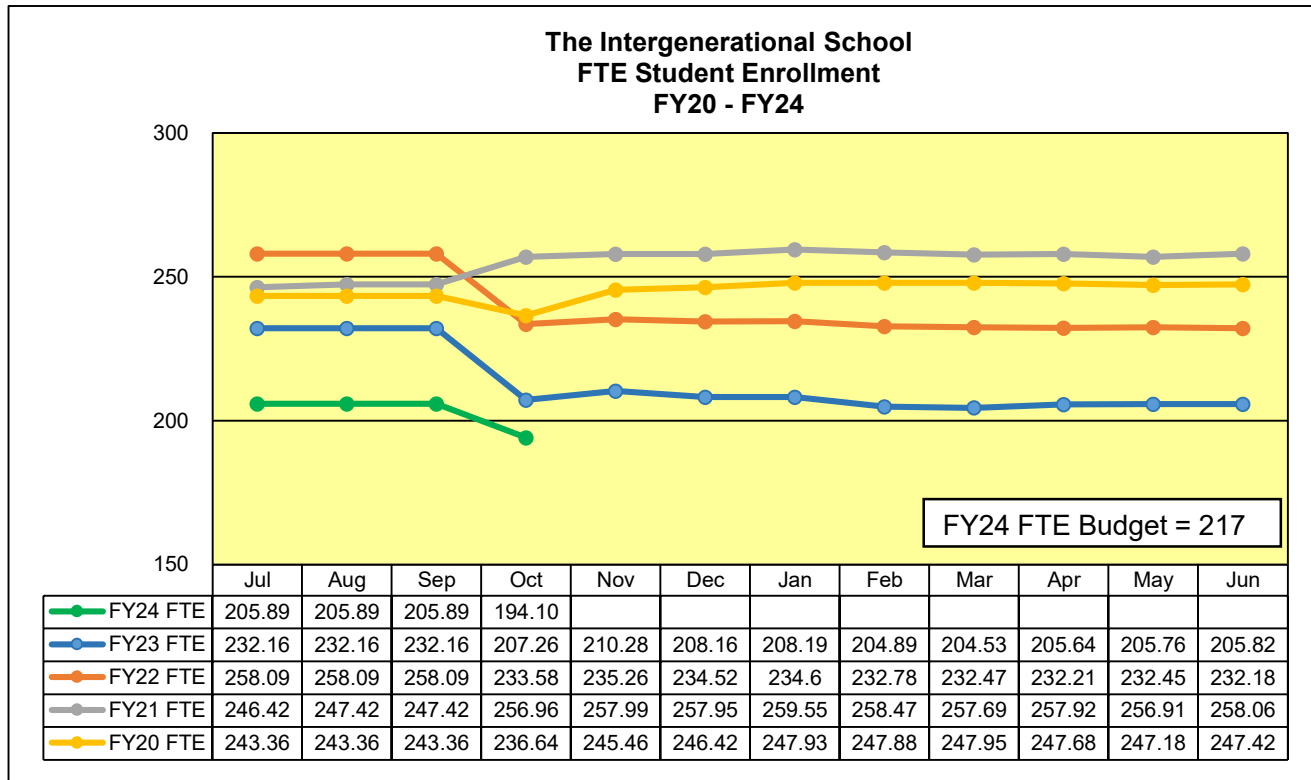
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Financial Report – October 2023

Student Enrollment

The chart below provides a trend line summary of Full Time Equivalent (FTE) student enrollment. The October Foundation Report reflects the change in FTE's for the new school year. The FTE totals for subsequent months are based upon FTE student data as reported by the Ohio Department of Education through the monthly State Settlement reports. TIS enrollment was 194.1 in October, which is 22.9 FTE below budget.



Federal Programs

The chart below provides a summary of the FY24 federal allocations for The Intergenerational School Consolidated Federal Programs (CCIP). Allocations are earmarked for salaries, benefits and professional development services. The CCIP allocation for FY24 is \$1,543,519. Disbursements have totaled \$330,781 year-to-date. Receipts have totaled \$158,149 year-to-date.

The Intergenerational School CCIP - Federal Education Programs						
Federal Program	Schoolwide		IDEA-B		ESSER 3	Totals
FY24 Allocation	\$ 734,121		\$ 50,696		\$ 758,703	\$ 1,543,519
YTD Receipts	149,995		8,154		-	158,149
YTD Disbursements	185,204		10,512		135,065	330,781
Fund Balance	(35,210)		(2,357)		(135,065)	(172,632)
Encumbered Funds	548,916		40,184		623,638	1,212,738
Allocation Balance	\$ -		\$ -		\$ -	\$ -



Financial Report – October 2023

FY24 Projection

The Intergenerational School's FY24 surplus through October was \$33,909. The year-end surplus is projected to be \$650,510 based upon anticipated receipts and disbursements. FY24 Core Program Receipts are projected to be \$3,051,848, an unfavorable (\$947,421) budget variance. The Core Program Expenses for FY24 are projected to be (\$3,053,765), a favorable \$16,226 budget variance. As a result, the projected FY24 core budget variance is an unfavorable (\$931,195) based upon current revenue and expense assumptions.

	YTD Actual (1)	FY24 Projection (2)	FY24 Act + Proj	FY24 Budget (3)	Budget Variance
FTE ENROLLMENT (4)	194.10	22.90	217.00	217.00	0.00
REVENUE					
State Foundation (excl SPED)	\$ 792,252	\$ 1,053,079	\$ 1,845,331	\$ 2,023,525	\$ (178,194)
CCIP Funding (excl Title VI-B) (5)	37,499	146,032	183,531	734,121	(550,590)
Facilities Funding	-	217,000	217,000	217,000	-
Property Tax Levy (6)	-	-	-	247,238	(247,238)
Casino	6,833	12,489	19,322	19,322	-
Charter School Equity Supplement	-	141,050	141,050	141,050	-
BASE REVENUE	836,583	1,569,650	2,406,234	3,382,256	(976,023)
State Foundation SPED	-	262,611	262,611	294,699	(32,088)
Title VI-B	8,154	42,542	50,696	50,696	-
Food Funding	586	157,824	158,411	158,411	-
Other Revenues	57,978	115,919	173,897	113,207	60,690
OTHER REVENUE	66,718	578,896	645,614	617,013	28,602
TOTAL REVENUE	903,302	2,148,546	3,051,848	3,999,269	(947,421)
EXPENSES					
Instruction Staff	\$ (212,136)	\$ (824,292)	\$ (1,036,428)	\$ (995,105)	\$ (41,323)
Admin/Ops Staff	(143,613)	(372,016)	(515,628)	(633,618)	117,990
Purchased Services - Food	(29,371)	(129,040)	(158,411)	(158,411)	-
Purchased Services - Special Education	(11,583)	(169,391)	(180,974)	(176,949)	(4,025)
Purchased Services - Facilities	(109,008)	(234,391)	(343,400)	(331,100)	(12,300)
Purchased Services - Consulting	(51,508)	(236,331)	(287,839)	(276,105)	(11,734)
Purchased Services - Other	(80,497)	(182,541)	(263,038)	(261,094)	(1,944)
Supplies	(43,420)	(151,870)	(195,289)	(191,689)	(3,600)
Other Expenses	(28,245)	(44,512)	(72,758)	(45,920)	(26,838)
TOTAL EXPENSES	(709,381)	(2,344,384)	(3,053,765)	(3,069,991)	16,226
SURPLUS/DEFICIT	\$ 193,921	\$ (195,838)	\$ (1,917)	\$ 929,278	\$ (931,195)
EXTRAORDINARY REVENUE & EXPENSES					
Rent	(24,947)	(49,894)	(74,842)	(74,842)	-
Facilities & Equipment	-	-	-	-	-
IGC Base Support	-	74,842	74,842	74,842	-
HQ School Funding	-	651,000	651,000	651,000	-
SURPLUS/DEFICIT incl Extraordinary Items	\$ 168,974	\$ 480,110	\$ 649,083	\$ 1,580,278	\$ (931,195)
ESSER Revenues	-	758,703	758,703	758,703	-
ESSER Expenses	(135,065)	(622,210)	(757,275)	(707,238)	(50,037)
SURPLUS/DEFICIT incl ESSER	\$ 33,909	\$ 616,602	\$ 650,510	\$ 1,631,742	\$ (981,232)

Notes

- 1 YTD Actuals are cash transactions for FY24 activities for the period of 07/01/23 to 10/31/23 (excludes FY23 activity).
- 2 FY24 Projections are anticipated cash transactions for FY24 (includes FY24 accruals projected to be paid after 06/30/24).
- 3 FY24 Budget based upon the approved April approved budget.
- 4 Projected enrollment is based on the expected enrollment of the school.
- 5 Projected CCIP revenue shortfall is due to actual allocations from ODE
- 6 Projected Property Tax shortfall is due to TIS no longer being a CMSD partner school in FY24

The information in this report is based upon pre-audit accounting to facilitate ongoing financial management and planning.



Financial Report – October 2023

Equity Position

The chart below outlines the balance sheet totals for the current and prior year months. All of the information in this financial report is based upon pre-audit estimates using available information as of November 21, 2023. GASB 68 pension liability entries are not included in this Balance Sheet Summary as they are not a legal liability for the School. This information should not be used for official financial analysis or reporting. It is provided solely for the use of the Board and Administration to facilitate future financial planning.

**The Intergenerational School
Balance Sheet Summary
October 2023 and October 2022**

ASSETS	10/31/2023	10/31/2022	\$ Change
Current Assets			
Cash	\$ 2,011,271	\$ 1,422,275	\$ 588,996
Accounts Receivable (1)	146,225	185,738	(39,513)
IGC Receivable	10,880	-	10,880
Other Current Assets	-	-	-
Total Current Assets	2,168,376	1,608,013	560,363
Non-Current Assets			
Capital Assets, net	1,263,417	1,324,078	(60,661)
Other Non-Current Assets	-	-	-
Total Non-Current Assets	1,263,417	1,324,078	(60,661)
TOTAL ASSETS	\$ 3,431,792	\$ 2,932,091	\$ 499,701
LIABILITIES			
Current Liabilities			
Accounts Payable	197,860	95	197,765
Wages & Benefits Payable (2)	80,381	90,608	(10,227)
Loan Payable	36,286	37,480	(1,194)
Total Current Liabilities	314,527	128,183	186,344
Non-Current Liabilities			
Note Payable	883,166	916,743	(33,577)
Other Non-Current Liabilities	-	-	-
Total Non-Current Liabilities	883,166	916,743	(33,577)
TOTAL LIABILITIES	\$ 1,197,693	\$ 1,044,926	\$ 152,767
NET EQUITY			
Net Assets			
Invested in Capital Assets, net	343,965	369,855	(25,890)
Restricted	39,884	83,727	(43,843)
Unrestricted	1,850,250	1,433,583	416,667
TOTAL NET ASSETS (3)	2,234,099	1,887,165	346,934
TOTAL LIABILITIES & NET ASSETS	\$ 3,431,792	\$ 2,932,091	\$ 499,701

Notes

- 1 Accounts Receivables include CCIP/Title reimbursements.
- 2 Wage and Benefits Obligations include stretch pay for teachers and payroll tax liabilities.
- 3 Total Net Assets are preliminary estimates based upon pre-audit financial information

The information in this report is based upon pre-audit accounting to facilitate ongoing financial management and planning.



Financial Report – October 2023

Key Financials:

(in \$thousands)

o YTD Net Income	(\$101)
o FY24 Projected Net Income	(\$106)
o FY24 Projected Budget Variance	(\$12)
o Month-end Cash Balance	+\$1,051
o Unrestricted Net Assets	+\$1,216

Fiscal Health:

Benchmarks		IGC
Liquidity Ratio Index	$\frac{\text{Current Assets}}{\text{Current Liabilities}}$	115.71
Operating Cash Ratio	$\frac{\text{Total Cash}}{\text{Avg. Monthly Exp.}}$	17.28 months
Reserve Ratio Index	$\frac{\text{Fund Balance}}{\text{Avg. Monthly Exp.}}$	19.99 months

Note: Fund Balance is equal to Unrestricted Net Assets plus Net income.

Treasurer Notes:

o **FY24 Projection**

Intergenerational Cleveland's FY24 deficit through October was (\$100,580). The year-end deficit is projected to be (\$105,999) based upon anticipated receipts and disbursements. FY24 Core Program Receipts are projected to be \$623,918, a favorable \$4,418 budget variance. The Core Program Expenses for FY24 are projected to be (\$399,916), an unfavorable (\$16,476) budget variance. As a result, the projected FY24 core budget variance is an unfavorable (\$12.059) based upon current revenue and expense assumptions.

o **Cash Flow**

The cash balance for IGC decreased by \$25,054 in October. Near-term cash balances are expected to decrease based on projected operating expenses and expected fundraising.

Proposed Board Action Items:

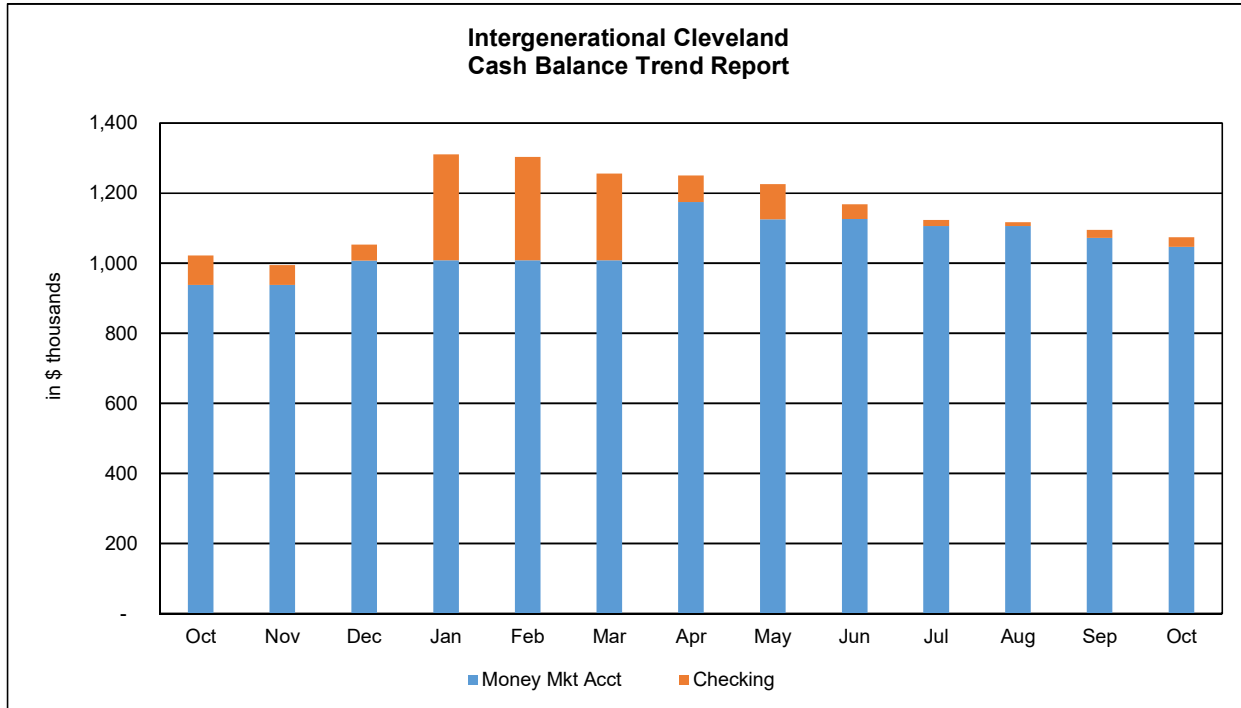
- 1) Continue planning related to IGC long-term financial goals, including specific benchmarks related to revenue generation and/or expenses reduction objectives for FY24.



Financial Report – October 2023

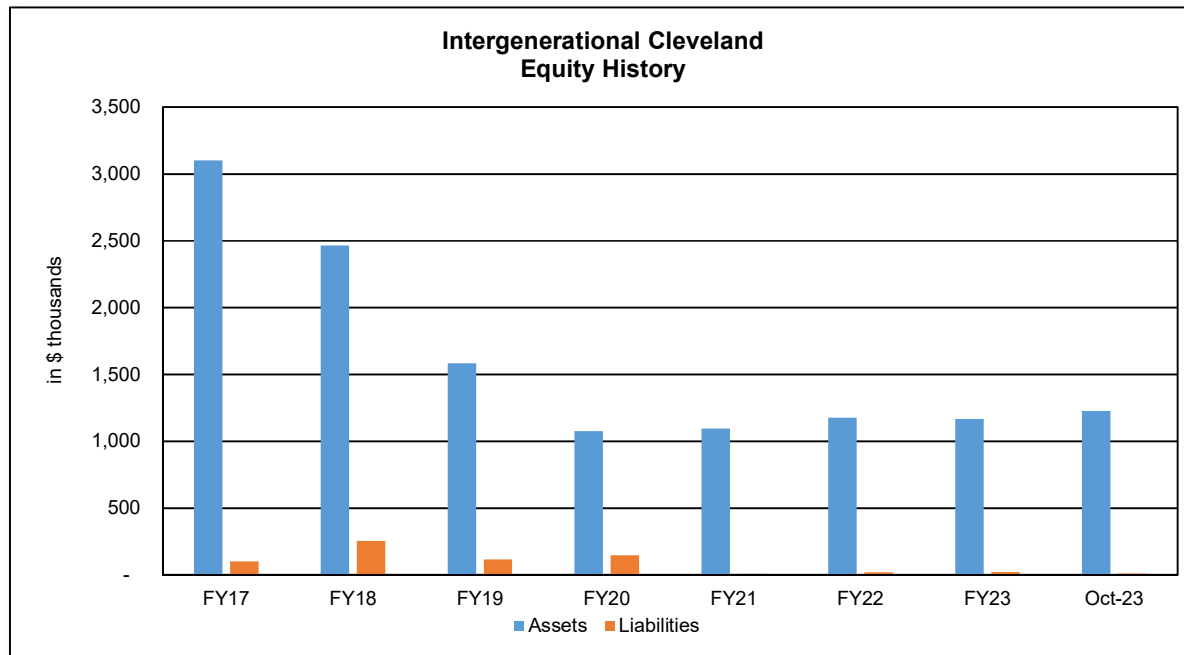
Cash Position

The chart below provides the month-end cash balances for IGC over the past 13 months. Cash balances are expected to decrease during the remainder of Fiscal Year based on the current operating revenue and expense projections.



Equity Position History

The chart below outlines the IGC balance sheet totals based upon prior financial reports for Fiscal Year 2017 through Oct 2023. Both assets and liabilities reduced significantly during FY17 to FY20 as a result of Base Support distributions to the schools. FY24 & Oct 2024 is based upon pre-audit financials.



The information in this report is based upon pre-audit accounting to facilitate ongoing financial management and planning.



Financial Report – October 2023

FY24 Projection

Intergenerational Cleveland's FY24 deficit through October was (\$100,580). The year-end deficit is projected to be (\$105,999) based upon anticipated receipts and disbursements. FY24 Core Program Receipts are projected to be \$623,918, a favorable \$4,418 budget variance. The Core Program Expenses for FY24 are projected to be (\$399,916), an unfavorable (\$16,476) budget variance. As a result, the projected FY24 core budget variance is an unfavorable (\$12,059) based upon current revenue and expense assumptions.

	YTD Actual (1)	FY24 Projection (2)	FY24 Act + Proj	FY24 Budget (3)	Budget Variance
REVENUE					
Direct Support	\$ 6,455	\$ 543,545	\$ 550,000	\$ 550,000	\$ -
School Revenues	-	69,500	\$ 69,500	69,500	-
Other Revenues	1,473	2,945	\$ 4,418	-	4,418
TOTAL REVENUE	7,928	615,990	623,918	619,500	4,418
EXPENSES					
Admin/Ops Staff	\$ (16,147)	\$ (40,164)	\$ (56,311)	\$ (54,920)	\$ (1,391)
Purchased Services (excl rent)	(57,330)	(253,741)	\$ (311,071)	(311,700)	629
Supplies	(21,197)	(2,025)	\$ (23,223)	(10,270)	(12,953)
Other Expenses	(13,834)	4,522	\$ (9,312)	(6,550)	(2,762)
TOTAL EXPENSES	(108,508)	(291,408)	(399,916)	(383,440)	(16,476)
CORE PROGRAM SURPLUS/DEFICIT	\$ (100,580)	\$ 324,581	\$ 224,001	\$ 236,060	\$ (12,059)
EXTRAORDINARY REVENUE & EXPENSES					
IGC Base Support	\$ -	(330,000)	\$ (330,000)	(330,000)	-
SURPLUS/DEFICIT incl Extraordinary Item	\$ (100,580)	\$ (5,419)	\$ (105,999)	\$ (93,940)	\$ (12,059)

Notes

- 1 YTD Actuals are cash transactions for FY24 activities for the period of 07/01/23 to 10/31/23 (excludes FY23 activity).
- 2 FY24 Projections are anticipated cash transactions for remaining FY24 activity (includes FY24 accruals to be paid/rec'd after 06/30/24).
- 3 FY24 Budget is based upon May approved budget.
- 4 Projected IGC Donations are based upon contributions toward Rent/Mortgage, Facilities & Equipment.



Financial Report – October 2023

Equity Position

The chart below outlines the balance sheet totals for the current and prior year months. All of the information in this financial report is based upon pre-audit estimates using available information as of November 15, 2023. This information should not be used for official financial analysis or reporting. It is provided solely for the use of the Board and Administration to facilitate future financial planning.

Intergenerational Cleveland Balance Sheet Summary October 2023 and October 2022
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ASSETS	10/31/2023	10/31/2022	\$ Change
Current Assets			
Cash	\$ 1,050,883	\$ 1,009,677	\$ 41,206
Accounts Receivable	175,406	82,763	92,643 ¹
Intranetwork Receivable	-	52,347	(52,347)
Other Current Assets	-	-	-
Total Current Assets	1,226,289	1,144,787	81,502
Non-Current Assets			
Capital Assets, net	72	173	(101)
Other Non-Current Assets	-	-	-
Total Non-Current Assets	72	173	(101)
TOTAL ASSETS	\$ 1,226,361	\$ 1,144,960	\$ 81,401
LIABILITIES			
Current Liabilities			
Accounts Payable	2,750	84,498	(81,748)
Wages & Benefits Payable	7,848	5,324	2,524
Other Current Liabilities	-	-	-
Total Current Liabilities	10,598	89,822	(79,224)
Non-Current Liabilities			
Note Payable	-	-	-
Other Non-Current Liabilities	-	-	-
Total Non-Current Liabilities	-	-	-
TOTAL LIABILITIES	\$ 10,598	\$ 89,822	\$ (79,224)
NET EQUITY			
Net Assets			
Invested in Capital Assets, net	72	173	(101)
Restricted	-	15,000	(15,000)
Unrestricted	1,215,691	1,039,965	175,726
TOTAL NET ASSETS	1,215,762	1,055,138	160,624 ²
TOTAL LIABILITIES & NET ASSETS	\$ 1,226,361	\$ 1,144,960	\$ 81,401

Notes

- 1 Accounts Payable include support payments receivable by network schools.
- 2 Total Net Assets are preliminary estimates based upon pre-audit financial information.

The information in this report is based upon pre-audit accounting to facilitate ongoing financial management and planning.



Financial Report – October 2023

Key Financials:

(in \$thousands)

- o YTD Core Program Net Income +\$279
- o FY24 Core Program Projected Net Income (\$144)
- o FY24 Core Program Projected Budget Variance (\$42)
- o Month-end Cash Balance +\$4,298
- o Unrestricted Net Assets +\$3,339

Fiscal Health:

CMSD Benchmarks		CMSD Standard	NWIS	Status
Liquidity Ratio Index	$\frac{\text{Current Assets}}{\text{Current Liabilities}}$	1.0 to 1.1	4.56	Exceeds
Operating Cash Ratio	$\frac{\text{Total Cash}}{\text{Avg. Monthly Exp.}}$	1.0 to 2.0 Months Cash	14.71 months	Exceeds
Reserve Ratio Index	$\frac{\text{Fund Balance}}{\text{Avg. Monthly Exp.}}$	0.40 to 0.75	11.43 months	Exceeds
FTE Variance - October 2023	$\frac{\text{Actual FTE}}{\text{Budgeted FTE}}$	90.0%-94.9% of Budget	88.6%	Below

Note: Fund Balance is equal to Unrestricted Net Assets plus Net income.

Treasurer Notes:

- o **FY24 Projection**
Near West Intergenerational School's FY24 surplus through October was \$279,087. The year-end surplus is projected to be \$495,773 based upon anticipated receipts and disbursements. FY24 Core Program Receipts are projected to be \$3,327,679, an unfavorable (\$112,357) budget variance. The Core Program Expenses for FY24 are projected to be (\$3,471,536), a favorable \$69,986 budget variance. As a result, the projected FY24 core budget variance is an unfavorable (\$42,371) based upon current revenue and expense assumptions.
- o **Planning for Fiscal Year 2025**
The planning for the 2024-2025 school year is underway. Establishing board priorities and goals in student learning growth, enrollment, finance, facilities, technology, etc. will help in creating a school plan for the 2024-2025 school year that is aligned to the school's long-term vision.
- o **Fall Reports Budget Update**
The chart on page four has been updated to include amounts from the October 2023 board-approved Five-Year Forecast. All budget variances are updated to be based off of the current budgeted revenues and expenses.

Proposed Board Action Items:

- 1) *Continue discussions related to the need to ramp up philanthropic support.*

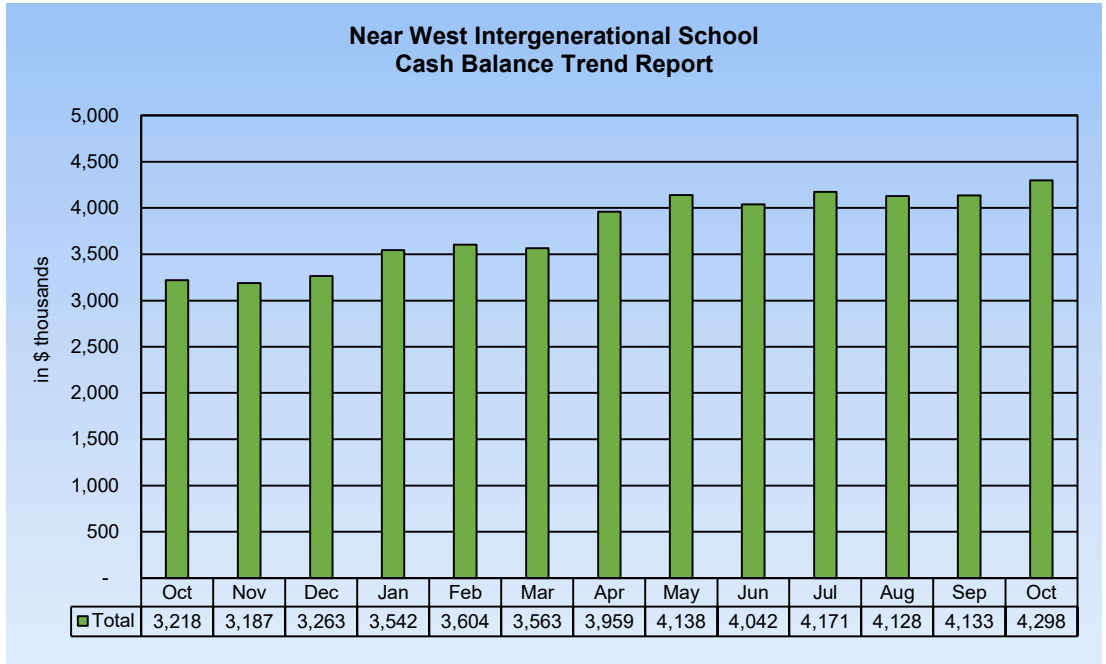


Financial Report – October 2023

Cash Position

The total cash balance for the Near West Intergenerational School was \$4,298,243 at the end of October. Unrestricted Funds closed the month at \$4,319,046. The Restricted Funds closed the month at (\$20,803). Cash flow trend details for the past 13 months are provided on the chart below.

MONTH END CASH BALANCE DETAIL	
Unrestricted Funds	
General	\$ 4,427,226
Food	\$ (63,145)
IGC Expenses	\$ (45,035)
Subtotal	\$ 4,319,046
Restricted Funds	
ARP IDEA	\$ (12,399)
Ohio Arts	\$ 4,920
Wellness	\$ 33,910
Safety Grant	\$ 2,500
ESSER III	\$ (2,415)
Title VI-B	\$ (7,754)
Schoolwide	\$ (26,633)
Athletic Fund	\$ 409
EOEC	\$ (15,840)
State Grant	\$ 2,500
Subtotal	\$ (20,803)
Total	\$ 4,298,243



Bank Reconciliation

The table below provides a summary of Near West Intergenerational School reconciliation for the period ending October 31, 2023. The ending book balance was \$4,298,243. The ending bank statement balance was \$4,350,528. Outstanding checks (checks that have been sent, but not yet cashed) totaled \$52,285. Monthly interest from the STAR Ohio account was \$191,745.70.

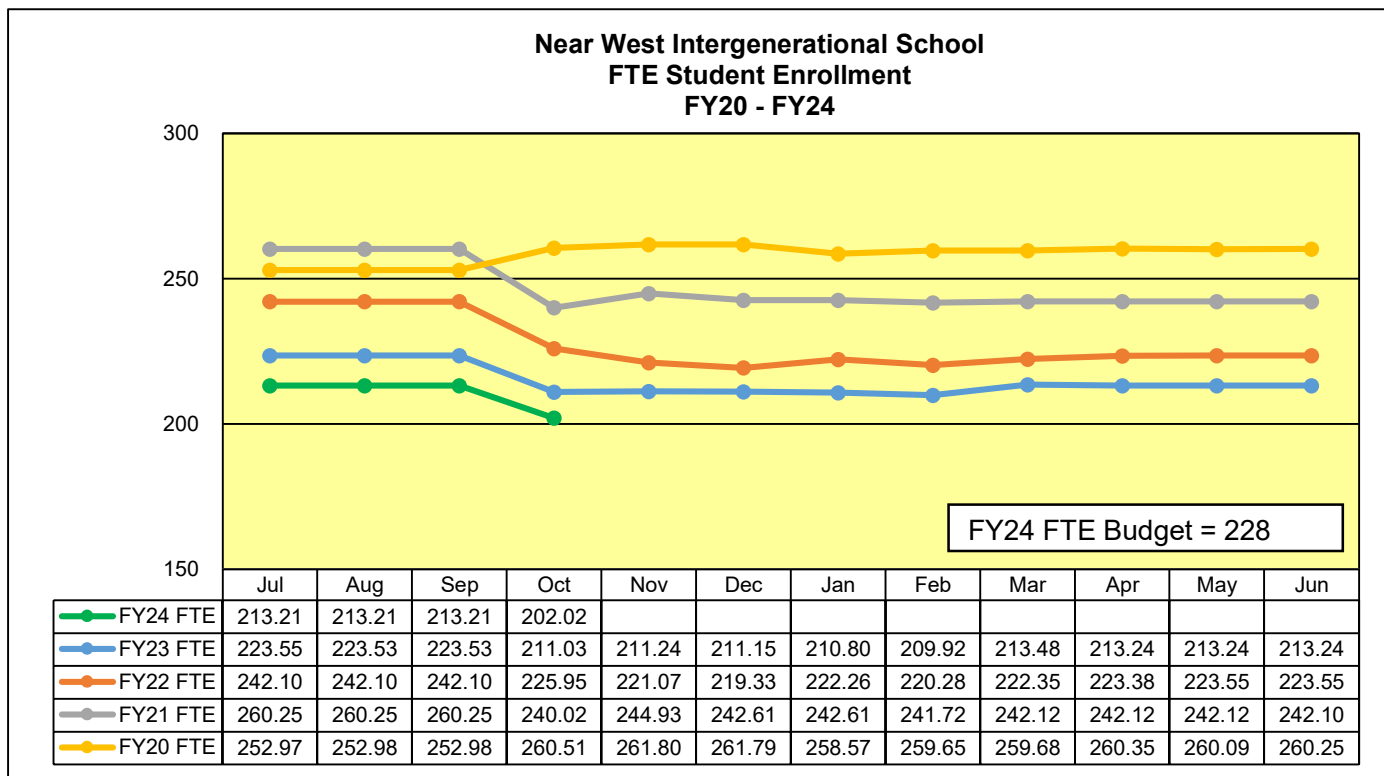
Near West Intergenerational School October 31, 2023	
Book Balance	
Beginning Book Balance	\$ 4,133,287
Ending Book Balance	\$ 4,298,243
Bank Balance	
Key Bank Balance	194,161
STAR Ohio Balance	4,156,368
Ending Bank Balance	\$ 4,350,528
Outstanding Checks	52,285
Reconciled Cash Balance	\$ 4,298,243



Financial Report – October 2023

Student Enrollment

The chart below provides a trend line summary of Full Time Equivalent (FTE) student enrollment. The October Foundation Report reflects the change in FTE's for the new school year. The FTE totals for subsequent months are based upon FTE student data as reported by the Ohio Department of Education through the monthly State Settlement reports. NWIS enrollment was 202.02 in October, which is 25.98 FTE below budget.



Federal Programs

The chart below provides a summary of the FY24 federal allocations for the Near West Intergenerational School Consolidated Federal Programs (CCIP). Allocations are earmarked for salaries, benefits and professional development services. The CCIP allocation for FY24 is \$605,468. Disbursements have totaled \$161,808 year-to-date. Receipts have totaled \$132,092 year-to-date.

Near West Intergenerational School CCIP - Federal Education Programs						
Federal Program	Schoolwide	IDEA-B	ESSER 3	Totals		
FY24 Allocation	\$ 547,334	\$ 58,133	\$ -	\$ 605,468		
YTD Receipts	121,427	10,665	-	132,092		
YTD Disbursements	148,061	13,748	-	161,808		
Fund Balance	(26,633)	(3,083)	-	(29,716)		
Encumbered Funds	399,274	44,385	-	443,659		
Allocation Balance	\$ -	\$ -	\$ -	\$ -		



Financial Report – October 2023

FY24 Projection

Near West Intergenerational School's FY24 surplus through October was \$279,087. The year-end surplus is projected to be \$495,773 based upon anticipated receipts and disbursements. FY24 Core Program Receipts are projected to be \$3,327,679, an unfavorable (\$112,357) budget variance. The Core Program Expenses for FY24 are projected to be (\$3,471,536), a favorable \$69,986 budget variance. As a result, the projected FY24 core budget variance is an unfavorable (\$42,371) based upon current revenue and expense assumptions.

	YTD Actual (1)	FY24 Projection (2)	FY24 Act + Proj	FY24 Budget (3)	Budget Variance
FTE ENROLLMENT (4)	202.02	25.98	228.00	228.00	0.00
REVENUE					
State Foundation (excl SPED) (5)	\$ 764,869	\$ 1,219,311	\$ 1,984,180	\$ 2,096,537	\$ (112,357)
CCIP Funding (excl Title VI-B)	30,357	106,477	136,834	136,834	-
Facilities Funding	-	238,000	238,000	238,000	-
Property Tax Levy	140,793	37,495	178,288	178,288	-
Casino	7,203	10,624	17,827	17,827	-
Charter School Equity Supplement	-	152,320	152,320	152,320	-
BASE REVENUE	943,223	1,764,226	2,707,449	2,819,806	(112,357)
State Foundation SPED	-	223,526	223,526	223,526	-
Title VI-B	10,665	47,468	58,133	58,133	(0)
Food Funding	1,543	100,495	102,039	102,039	-
Other Revenues	78,842	157,690	236,532	236,532	-
OTHER REVENUE	91,051	529,179	620,230	620,230	(0)
TOTAL REVENUE	1,034,273	2,293,405	3,327,679	3,440,035	(112,357)
EXPENSES					
Instruction Staff	\$ (320,718)	\$ (1,593,806)	\$ (1,914,524)	\$ (1,953,966)	\$ 39,442
Admin/Ops Staff	(148,706)	(404,193)	(552,898)	(567,532)	14,633
Purchased Services - Food	(19,860)	(96,000)	(115,860)	(124,039)	8,179
Purchased Services - Special Education	(28,232)	(259,602)	(287,834)	(287,834)	-
Purchased Services - Facilities	(25,121)	(131,886)	(157,007)	(157,340)	333
Purchased Services - Consulting	(107,216)	(38,357)	(145,574)	(146,450)	876
Purchased Services - Other	(54,796)	(132,908)	(187,704)	(187,686)	(17)
Supplies	(26,055)	(56,356)	(82,410)	(88,950)	6,540
Other Expenses	(12,816)	(14,909)	(27,725)	(27,725)	-
TOTAL EXPENSES	(743,519)	(2,728,016)	(3,471,536)	(3,541,522)	69,986
SURPLUS/DEFICIT	\$ 290,754	\$ (434,611)	\$ (143,857)	\$ (101,486)	\$ (42,371)
EXTRAORDINARY REVENUE & EXPENSES					
Rent	(11,667)	(23,333)	(35,000)	(35,000)	-
Facilities & Equipment	-	-	-	-	-
IGC Base Support	-	35,000	35,000	35,000	-
HQ School Funding	-	639,630	639,630	639,630	-
SURPLUS/DEFICIT incl Extraordinary Items	\$ 279,087	\$ 216,686	\$ 495,773	\$ 538,144	\$ (42,371)
ESSER	-	-	-	-	-
SURPLUS/DEFICIT incl ESSER	\$ 279,087	\$ 216,686	\$ 495,773	\$ 538,144	\$ (42,371)

Notes

- 1 YTD Actuals are cash transactions for FY24 activities for the period of 07/01/23 to 10/31/23 (excludes FY23 activity).
- 2 FY24 Projections are anticipated cash transactions for remaining FY24 activity (includes FY24 accruals to be paid/rec'd after 06/30/24).
- 3 FY24 Budget based upon the approved April approved budget.
- 4 Projected enrollment is based on the expected enrollment of the school.
- 5 Projected State Revenue variance aligns with the most recent payment information from ODE

The information in this report is based upon pre-audit accounting to facilitate ongoing financial management and planning.



Financial Report – October 2023

Equity Position

The chart below outlines the balance sheet totals for the current and prior year months. All of the information in this financial report is based upon pre-audit estimates using available information as of November 21, 2023. GASB 68 pension liability entries are not included in this Balance Sheet Summary as they are not a legal liability for the School. This information should not be used for official financial analysis or reporting. It is provided solely for the use of the Board and Administration to facilitate future financial planning.

Near West Intergenerational School Balance Sheet Summary October 2023 and October 2022

ASSETS	10/31/2023	10/31/2022	\$ Change
Current Assets			
Cash	\$ 4,298,243	\$ 3,217,874	\$ 1,080,369
Accounts Receivable(1)	32,667	148,038	(115,371)
IGC Receivable	-	-	-
Other Current Assets	-	-	-
Total Current Assets	4,330,910	3,365,912	964,998
Non-Current Assets			
Capital Assets, net	37,121	48,419	(11,298)
Other Non-Current Assets	-	-	-
Total Non-Current Assets	37,121	48,419	(11,298)
TOTAL ASSETS	\$ 4,368,032	\$ 3,414,331	\$ 953,701
LIABILITIES			
Current Liabilities			
Accounts Payable	\$ 812,378	\$ 1,121,451	\$ (309,073)
Wages & Benefits Payable (2)	138,150	108,238	29,912
Loan Payable	-	-	-
Total Current Liabilities	950,528	1,229,689	(279,161)
Non-Current Liabilities			
Note Payable	-	-	-
Other Non-Current Liabilities	-	-	-
Total Non-Current Liabilities	-	-	-
TOTAL LIABILITIES	\$ 950,528	\$ 1,229,689	\$ (279,161)
NET EQUITY			
Net Assets			
Invested in Capital Assets, net	37,121	48,419	(11,298)
Restricted	41,739	96,767	(55,028)
Unrestricted	3,338,644	2,039,456	1,299,188
TOTAL NET ASSETS (3)	3,417,504	2,184,642	1,232,862
TOTAL LIABILITIES & NET ASSETS	\$ 4,368,032	\$ 3,414,331	\$ 953,701

Notes

- 1 Accounts Receivables include CCIP/Title reimbursements.
- 2 Wage and Benefits Obligations include stretch pay for teachers and payroll tax liabilities.
- 3 Total Net Assets are preliminary estimates based upon pre-audit financial information

The information in this report is based upon pre-audit accounting to facilitate ongoing financial management and planning.



Financial Report – November 2023

Key Financials:

(in \$thousands)

- o YTD Core Program Net Income (\$10)
- o FY24 Core Program Projected Net Income (\$597)
- o FY24 Core Program Projected Budget Variance (\$1,526)
- o Month-end Cash Balance +\$1,926
- o Unrestricted Net Assets +\$1,831

Fiscal Health:

CMSD Benchmarks		CMSD Standard	TIS	Status
Liquidity Ratio Index	$\frac{\text{Current Assets}}{\text{Current Liabilities}}$	1.0 to 1.1	7.02	Exceeds
Operating Cash Ratio	$\frac{\text{Total Cash}}{\text{Avg. Monthly Exp.}}$	1.0 to 2.0 Months Cash	5.29 months	Exceeds
Reserve Ratio Index	$\frac{\text{Fund Balance}}{\text{Avg. Monthly Exp.}}$	0.40 to 0.75	5.03 months	Exceeds
FTE Variance - November 2023	$\frac{\text{Actual FTE}}{\text{Budgeted FTE}}$	90.0%-94.9% of Budget	93.7%	Exceeds

Note: Fund Balance is equal to Unrestricted Net Assets plus Net income.

Treasurer Notes:

- o **FY24 Projection**
The Intergenerational School's FY24 deficit through November was (\$196,661). The year-end deficit is projected to be (\$20,048) based upon anticipated receipts and disbursements. FY24 Core Program Receipts are projected to be \$2,888,696, an unfavorable (\$1,110,573) budget variance. The Core Program Expenses for FY24 are projected to be (\$3,485,887), a favorable (\$415,896) budget variance. As a result, the projected FY24 core budget variance is an unfavorable (\$1,526,469) based upon current revenue and expense assumptions.
- o **Planning for Fiscal Year 2025**
The planning for the 2024-2025 school year is underway. Establishing board priorities and goals in student learning growth, enrollment, finance, facilities, technology, etc. will help in creating a school plan for the 2024-2025 school year that is aligned to the school's long-term vision.
- o **State Revenue Projections**
The projected state revenues in this report are updated based on the most recent State Foundation Payment reports from the Ohio Department of Education and Workforce. Projected revenues may fluctuate greatly from month to month based on the school's student data, especially the economically disadvantaged population. We are anticipating a large payment in January from the state for High Quality Community School funding.

Proposed Board Action Items:

- 1) **Continue discussions related to the need to ramp up philanthropic support.**

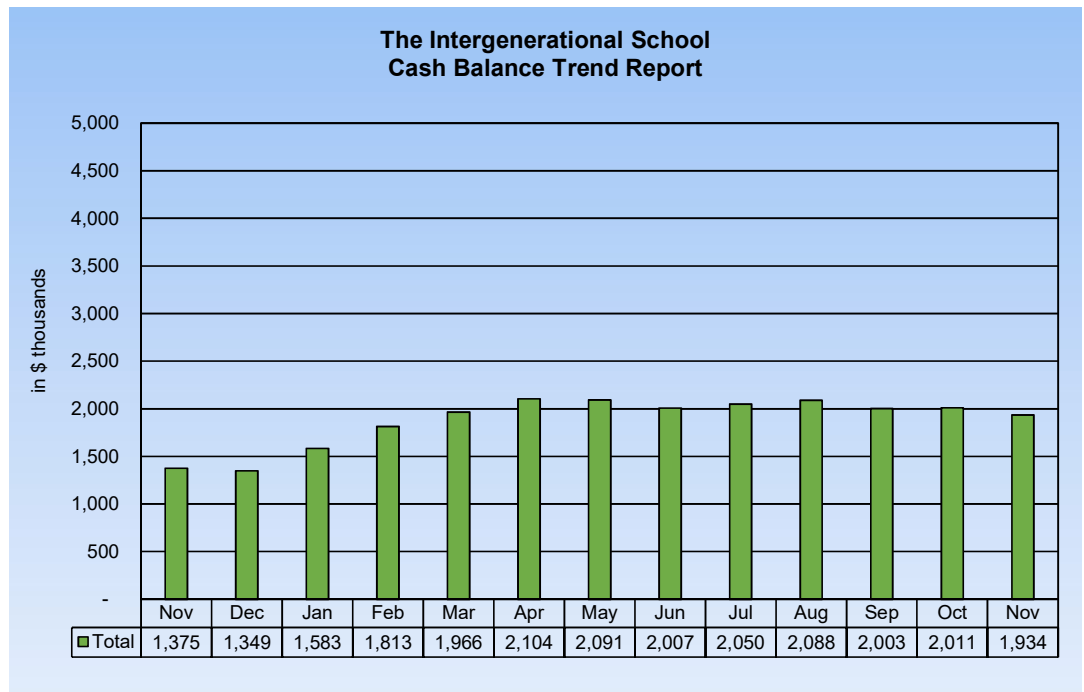


Financial Report – November 2023

Cash Position

The total cash balance for the The Intergenerational School was \$1,925,560 at the end of November. Unrestricted Funds closed the month at \$2,096,226. The Restricted Funds closed the month at (\$170,666). Cash flow trend details for the past 13 months are provided on the chart below.

MONTH END CASH BALANCE DETAIL	
<i>Unrestricted Funds</i>	
General	\$ 2,413,071
Food	(128,533)
IGC Expense	(188,312)
Subtotal	\$ 2,096,226
<i>Restricted Funds</i>	
Parent Group	\$ 4,067
St. Luke's Grant	370
Donate to Cancer	222
Sensory Room	210
Wellness	29,100
Flood Fund	-
Safety Grant	2,376
Title VI-B	(2,358)
ESSER III	(187,138)
Schoolwide	(8,804)
Athletic Fund	(8,712)
Subtotal	\$ (170,666)
Total	\$ 1,925,560



Bank Reconciliation

The table below provides a summary of The Intergenerational School reconciliation for the period ending November 30, 2023. The ending book balance was \$1,925,560. The ending bank statement balance was \$1,960,322. Outstanding checks (checks that have been sent, but not yet cashed) totaled \$34,762. Monthly interest from the STAR Ohio account was \$8,250.

The Intergenerational School November 30, 2023	
Book Balance	
Beginning Book Balance	\$ 2,011,271
Ending Book Balance	\$ 1,925,560
Bank Balance	
Key Bank Balance	153,977
Erie Bank Balance	78,059
STAR Ohio Balance	1,728,286
Ending Bank Balance	\$ 1,960,322
Outstanding Checks & Deposits	34,762
Reconciled Cash Balance	\$ 1,925,560

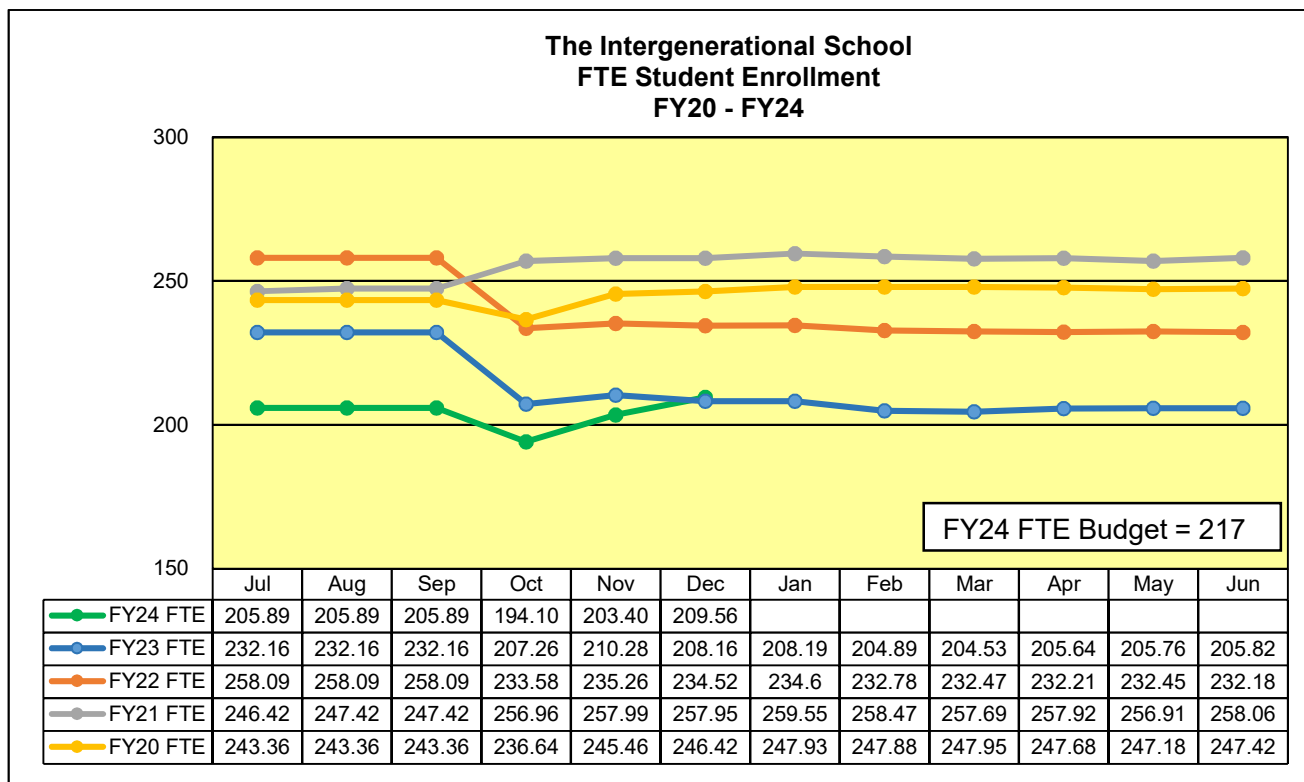
The information in this report is based upon pre-audit accounting to facilitate ongoing financial management and planning.



Financial Report – November 2023

Student Enrollment

The chart below provides a trend line summary of Full Time Equivalent (FTE) student enrollment. The October Foundation Report reflects the change in FTE's for the new school year. The FTE totals for subsequent months are based upon FTE student data as reported by the Ohio Department of Education through the monthly State Settlement reports. TIS enrollment was 203.4 in November, which is 13.6 FTE below budget.



Federal Programs

The chart below provides a summary of the FY24 federal allocations for The Intergenerational School Consolidated Federal Programs (CCIP). Allocations are earmarked for salaries, benefits and professional development services. The CCIP allocation for FY24 is \$1,543,519. Disbursements have totaled \$449,864 year-to-date. Receipts have totaled \$251,565 year-to-date.

The Intergenerational School CCIP - Federal Education Programs						
Federal Program	Schoolwide		IDEA-B		ESSER 3	Totals
FY24 Allocation	\$ 734,121		\$ 50,696		\$ 758,703	\$ 1,543,519
YTD Receipts	239,206		12,359		-	251,565
YTD Disbursements	248,010		14,717		187,138	449,864
Fund Balance	(8,804)		(2,358)		(187,138)	(198,299)
Encumbered Funds	486,111		35,979		571,565	1,093,655
Allocation Balance	\$ -		\$ -		\$ -	\$ -



Financial Report – November 2023

FY24 Projection

The Intergenerational School's FY24 deficit through November was (\$196,661). The year-end deficit is projected to be (\$20,048) based upon anticipated receipts and disbursements. FY24 Core Program Receipts are projected to be \$2,888,696, an unfavorable (\$1,110,573) budget variance. The Core Program Expenses for FY24 are projected to be (\$3,485,887), a favorable (\$415,896) budget variance. As a result, the projected FY24 core budget variance is an unfavorable (\$1,526,469) based upon current revenue and expense assumptions.

	YTD Actual (1)	FY24 Projection (2)	FY24 Act + Proj	FY24 Budget (3)	Budget Variance
FTE ENROLLMENT (4)	203.40	6.16	209.56	217.00	(7.44)
REVENUE					
State Foundation (excl SPED) (5)	\$ 767,712	\$ 949,404	\$ 1,717,116	\$ 2,023,525	\$ (306,409)
CCIP Funding (excl Title VI-B) (6)	53,199	130,332	183,531	734,121	(550,590)
Facilities Funding	83,405	126,155	209,560	217,000	(7,440)
Property Tax Levy (7)	-	-	-	247,238	(247,238)
Casino	6,833	12,489	19,322	19,322	-
Charter School Equity Supplement	55,087	81,127	136,214	141,050	(4,836)
BASE REVENUE	966,236	1,299,507	2,265,742	3,382,256	(1,116,514)
State Foundation SPED	102,564	151,044	253,607	294,699	(41,092)
Title VI-B	12,359	38,337	50,696	50,696	-
Food Funding	1,771	156,640	158,411	158,411	-
Other Revenues	66,777	93,463	160,240	113,207	47,033
OTHER REVENUE	183,471	439,483	622,954	617,013	5,941
TOTAL REVENUE	1,149,706	1,738,990	2,888,696	3,999,269	(1,110,573)
EXPENSES					
Instruction Staff	\$ (427,850)	\$ (812,147)	\$ (1,239,998)	\$ (995,105)	\$ (244,893)
Admin/Ops Staff	(230,494)	(431,152)	(661,646)	(633,618)	(28,028)
Purchased Services - Food	(46,602)	(111,809)	(158,411)	(158,411)	-
Purchased Services - Special Education	(24,899)	(155,768)	(180,667)	(176,949)	(3,718)
Purchased Services - Facilities	(131,089)	(212,311)	(343,400)	(331,100)	(12,300)
Purchased Services - Consulting (8)	(78,639)	(291,668)	(370,307)	(276,105)	(94,202)
Purchased Services - Other	(99,153)	(164,268)	(263,421)	(261,094)	(2,327)
Supplies	(58,191)	(137,486)	(195,677)	(191,689)	(3,988)
Other Expenses	(31,130)	(41,231)	(72,361)	(45,920)	(26,441)
TOTAL EXPENSES	(1,128,046)	(2,357,841)	(3,485,887)	(3,069,991)	(415,896)
SURPLUS/DEFICIT	\$ 21,660	\$ (618,852)	\$ (597,191)	\$ 929,278	\$ (1,526,469)
EXTRAORDINARY REVENUE & EXPENSES					
Rent	(31,184)	(43,658)	(74,842)	(74,842)	-
Facilities & Equipment	-	-	-	-	-
IGC Base Support	-	74,842	74,842	74,842	-
HQ School Funding	-	628,680	628,680	651,000	(22,320)
SURPLUS/DEFICIT incl Extraordinary Items	\$ (9,524)	\$ 41,013	\$ 31,489	\$ 1,580,278	\$ (1,548,789)
ESSER Revenues	-	758,703	758,703	758,703	-
ESSER Expenses	(187,138)	(623,102)	(810,239)	(707,238)	(103,001)
SURPLUS/DEFICIT incl ESSER	\$ (196,661)	\$ 176,613	\$ (20,048)	\$ 1,631,742	\$ (1,651,790)

Notes

- 1 YTD Actuals are cash transactions for FY24 activities for the period of 07/01/23 to 11/30/23 (excludes FY23 activity).
- 2 FY24 Projections are anticipated cash transactions for FY24 (includes FY24 accruals projected to be paid after 06/30/24).
- 3 FY24 Budget based upon the approved April approved budget.
- 4 Projected enrollment is based on the expected enrollment of the school.
- 5 Reduced foundation revenue attributed to large variance in economic disadvantaged funding
- 6 Projected CCIP revenue shortfall is due to actual allocations from ODE
- 7 Projected Property Tax shortfall is due to TIS no longer being a CMSD partner school in FY24

The information in this report is based upon pre-audit accounting to facilitate ongoing financial management and planning.



Financial Report – November 2023

Equity Position

The chart below outlines the balance sheet totals for the current and prior year months. All of the information in this financial report is based upon pre-audit estimates using available information as of December 13, 2023. GASB 68 pension liability entries are not included in this Balance Sheet Summary as they are not a legal liability for the School. This information should not be used for official financial analysis or reporting. It is provided solely for the use of the Board and Administration to facilitate future financial planning.

**The Intergenerational School
Balance Sheet Summary
November 2023 and November 2022**

ASSETS	11/30/2023	11/30/2022	\$ Change
Current Assets			
Cash	\$ 1,925,560	\$ 1,375,068	\$ 550,492
Accounts Receivable (1)	198,299	278,746	(80,447)
IGC Receivable	10,880	-	10,880
Other Current Assets	-	-	-
Total Current Assets	2,134,739	1,653,814	480,925
Non-Current Assets			
Capital Assets, net	1,258,679	1,318,980	(60,301)
Other Non-Current Assets	-	-	-
Total Non-Current Assets	1,258,679	1,318,980	(60,301)
TOTAL ASSETS	\$ 3,393,419	\$ 2,972,794	\$ 420,624
LIABILITIES			
Current Liabilities			
Accounts Payable	112,155	20,975	91,180
Wages & Benefits Payable (2)	155,633	114,438	41,195
Loan Payable	36,415	40,445	(4,030)
Total Current Liabilities	304,203	175,858	128,345
Non-Current Liabilities			
Note Payable	880,072	910,937	(30,865)
Other Non-Current Liabilities	-	-	-
Total Non-Current Liabilities	880,072	910,937	(30,865)
TOTAL LIABILITIES	\$ 1,184,275	\$ 1,086,795	\$ 97,480
NET EQUITY			
Net Assets			
Invested in Capital Assets, net	342,193	367,598	(25,405)
Restricted	36,342	74,572	(38,230)
Unrestricted	1,830,610	1,443,829	386,780
TOTAL NET ASSETS (3)	2,209,144	1,885,999	323,145
TOTAL LIABILITIES & NET ASSETS	\$ 3,393,419	\$ 2,972,794	\$ 420,624

Notes

- 1 Accounts Receivables include CCIP/Title reimbursements.
- 2 Wage and Benefits Obligations include stretch pay for teachers and payroll tax liabilities.
- 3 Total Net Assets are preliminary estimates based upon pre-audit financial information

The information in this report is based upon pre-audit accounting to facilitate ongoing financial management and planning.



Financial Report – November 2023

Key Financials:

(in \$thousands)

- o YTD Core Program Net Income +\$246
- o FY24 Core Program Projected Net Income +\$269
- o FY24 Core Program Projected Budget Variance +\$371
- o Month-end Cash Balance +\$4,238
- o Unrestricted Net Assets +\$3,956

Fiscal Health:

CMSD Benchmarks		CMSD Standard	NWIS	Status
Liquidity Ratio Index	$\frac{\text{Current Assets}}{\text{Current Liabilities}}$	1.0 to 1.1	15.45	Exceeds
Operating Cash Ratio	$\frac{\text{Total Cash}}{\text{Avg. Monthly Exp.}}$	1.0 to 2.0 Months Cash	14.39 months	Exceeds
Reserve Ratio Index	$\frac{\text{Fund Balance}}{\text{Avg. Monthly Exp.}}$	0.40 to 0.75	13.44 months	Exceeds
FTE Variance - November 2023	$\frac{\text{Actual FTE}}{\text{Budgeted FTE}}$	90.0%-94.9% of Budget	93.7%	Meets

Note: Fund Balance is equal to Unrestricted Net Assets plus Net income.

Treasurer Notes:

- o **FY24 Projection**
Near West Intergenerational School's FY24 surplus through November was \$231,822. The year-end surplus is projected to be \$909,039 based upon anticipated receipts and disbursements. FY24 Core Program Receipts are projected to be \$3,767,532, an unfavorable \$327,496 budget variance. The Core Program Expenses for FY24 are projected to be (\$3,498,122), a favorable \$43,399 budget variance. As a result, the projected FY24 core budget variance is a favorable \$370,896 based upon current revenue and expense assumptions.
- o **Planning for Fiscal Year 2025**
The planning for the 2024-2025 school year is underway. Establishing board priorities and goals in student learning growth, enrollment, finance, facilities, technology, etc. will help in creating a school plan for the 2024-2025 school year that is aligned to the school's long-term vision.
- o **State Revenue Projections**
The projected state revenues in this report are updated based on the most recent State Foundation Payment reports from the Ohio Department of Education and Workforce. Projected revenues may fluctuate greatly from month to month based on the school's student data, especially the economically disadvantaged population. We are anticipating a large payment in January from the state for High Quality Community School funding.

Proposed Board Action Items:

- 1) **Continue discussions related to the need to ramp up philanthropic support.**

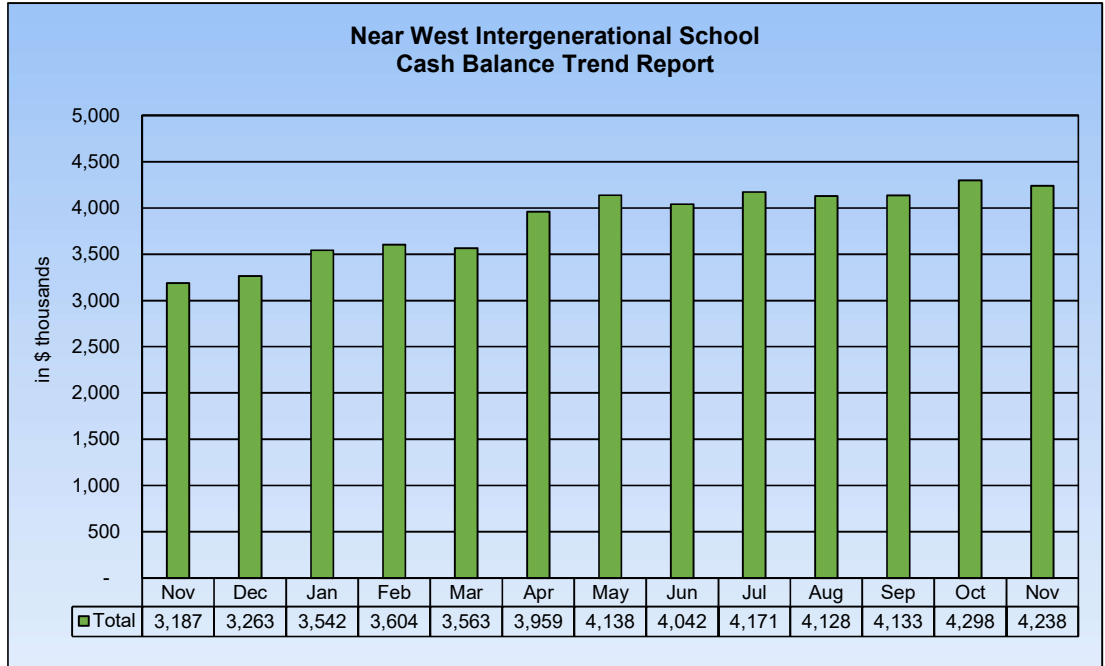


Financial Report – November 2023

Cash Position

The total cash balance for the Near West Intergenerational School was \$4,237,861 at the end of November. Unrestricted Funds closed the month at \$4,234,874. The Restricted Funds closed the month at \$2,987. Cash flow trend details for the past 13 months are provided on the chart below.

MONTH END CASH BALANCE DETAIL	
Unrestricted Funds	
General	\$ 4,349,557
Food	\$ (66,731)
IGC Expenses	\$ (47,952)
Subtotal	\$ 4,234,874
Restricted Funds	
ARP IDEA	\$ (12,399)
Ohio Arts	\$ 4,920
Wellness	\$ 31,067
Safety Grant	\$ 2,500
ESSER III	\$ (2,415)
Title VI-B	\$ (7,754)
Schoolwide	\$ -
Athletic Fund	\$ 409
EOEC	\$ (15,840)
State Grant	\$ 2,500
Subtotal	\$ 2,987
Total	\$ 4,237,861



Bank Reconciliation

The table below provides a summary of Near West Intergenerational School reconciliation for the period ending November 30, 2023. The ending book balance was \$4,237,861. The ending bank statement balance was \$4,258,819. Outstanding checks (checks that have been sent, but not yet cashed) totaled \$20,957. Monthly interest from the STAR Ohio account was \$19,018.84.

Near West Intergenerational School November 30, 2023	
Book Balance	
Beginning Book Balance	\$ 4,298,243
Ending Book Balance	\$ 4,237,861
Bank Balance	
Key Bank Balance	108,433
STAR Ohio Balance	4,150,386
Ending Bank Balance	\$ 4,258,819
Outstanding Checks	20,957
Reconciled Cash Balance	\$ 4,237,861

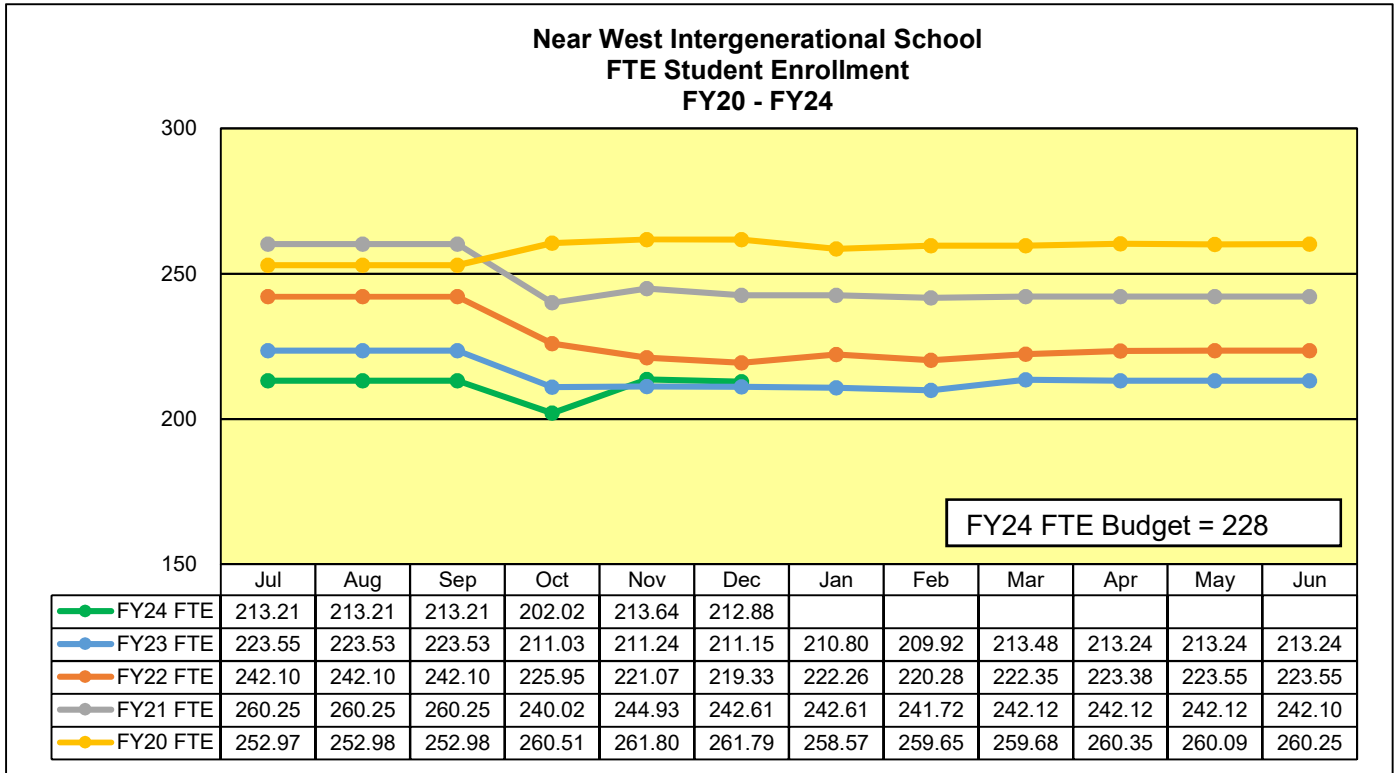
The information in this report is based upon pre-audit accounting to facilitate ongoing financial management and planning.



Financial Report – November 2023

Student Enrollment

The chart below provides a trend line summary of Full Time Equivalent (FTE) student enrollment. The October Foundation Report reflects the change in FTE's for the new school year. The FTE totals for subsequent months are based upon FTE student data as reported by the Ohio Department of Education through the monthly State Settlement reports. NWIS enrollment was 213.64 in November, which is 24.36 FTE below budget.



Federal Programs

The chart below provides a summary of the FY24 federal allocations for the Near West Intergenerational School Consolidated Federal Programs (CCIP). Allocations are earmarked for salaries, benefits and professional development services. The CCIP allocation for FY24 is \$605,468. Disbursements have totaled \$214,819 year-to-date. Receipts have totaled \$211,735 year-to-date.

Near West Intergenerational School CCIP - Federal Education Programs						
Federal Program	Schoolwide	IDEA-B	ESSER 3	Totals		
FY24 Allocation	\$ 547,334	\$ 58,133	\$ -	\$ 605,468		
YTD Receipts	195,572	16,163	-	211,735		
YTD Disbursements	195,572	19,247	-	214,819		
Fund Balance	-	(3,083)	-	(3,083)		
Encumbered Funds	364,762	39,570	-	404,332		
Allocation Balance	\$ (13,000)	\$ (683)	\$ -	\$ (13,683)		

The information in this report is based upon pre-audit accounting to facilitate ongoing financial management and planning.



Financial Report – November 2023

FY24 Projection

Near West Intergenerational School's FY24 surplus through November was \$231,822. The year-end surplus is projected to be \$909,039 based upon anticipated receipts and disbursements. FY24 Core Program Receipts are projected to be \$3,767,532, an unfavorable \$327,496 budget variance. The Core Program Expenses for FY24 are projected to be (\$3,498,122), a favorable \$43,399 budget variance. As a result, the projected FY24 core budget variance is a favorable \$370,896 based upon current revenue and expense assumptions.

	YTD Actual (1)	FY24 Projection (2)	FY24 Act + Proj	FY24 Budget (3)	Budget Variance
FTE ENROLLMENT (4)	213.64	(0.76)	212.88	228.00	(15.12)
REVENUE					
State Foundation (excl SPED) (5)	\$ 746,523	\$ 1,676,826	\$ 2,423,350	\$ 2,096,537	\$ 326,813
CCIP Funding (excl Title VI-B)	42,232	94,602	136,834	136,834	-
Facilities Funding	86,833	151,167	238,000	238,000	-
Property Tax Levy	140,793	37,495	178,288	178,288	-
Casino	7,203	10,624	17,827	17,827	-
Charter School Equity Supplement	57,860	94,460	152,320	152,320	-
BASE REVENUE	1,081,445	2,065,173	3,146,619	2,819,806	326,813
State Foundation SPED	109,430	114,096	223,526	223,526	-
Title VI-B	16,163	42,653	58,816	58,133	683
Food Funding	5,847	96,192	102,039	102,039	-
Other Revenues	98,000	138,532	236,532	236,532	-
OTHER REVENUE	229,440	391,473	620,913	620,230	683
TOTAL REVENUE	1,310,886	2,456,646	3,767,532	3,440,035	327,496
EXPENSES					
Instruction Staff	\$ (523,339)	\$ (1,414,215)	\$ (1,937,554)	\$ (1,953,966)	\$ 16,412
Admin/Ops Staff	(190,768)	(369,797)	(560,565)	(567,532)	6,967
Purchased Services - Food	(27,750)	(84,000)	(111,750)	(124,039)	12,289
Purchased Services - Special Education	(46,941)	(240,893)	(287,834)	(287,834)	-
Purchased Services - Facilities	(38,967)	(118,039)	(157,007)	(157,340)	333
Purchased Services - Consulting	(131,193)	(14,381)	(145,574)	(146,450)	876
Purchased Services - Other	(63,336)	(124,367)	(187,704)	(187,686)	(18)
Supplies	(26,782)	(55,628)	(82,410)	(88,950)	6,540
Other Expenses	(15,404)	(12,321)	(27,725)	(27,725)	-
TOTAL EXPENSES	(1,064,481)	(2,433,642)	(3,498,122)	(3,541,522)	43,399
SURPLUS/DEFICIT	\$ 246,405	\$ 23,004	\$ 269,409	\$ (101,486)	\$ 370,896
EXTRAORDINARY REVENUE & EXPENSES					
Rent	(14,583)	(20,417)	(35,000)	(35,000)	-
Facilities & Equipment	-	-	-	-	-
IGC Base Support	-	35,000	35,000	35,000	-
HQ School Funding	-	639,630	639,630	639,630	-
SURPLUS/DEFICIT incl Extraordinary Items	\$ 231,822	\$ 677,217	\$ 909,039	\$ 538,144	\$ 370,896
ESSER	-	-	-	-	-
SURPLUS/DEFICIT incl ESSER	\$ 231,822	\$ 677,217	\$ 909,039	\$ 538,144	\$ 370,896

Notes

- 1 YTD Actuals are cash transactions for FY24 activities for the period of 07/01/23 to 11/30/23 (excludes FY23 activity).
- 2 FY24 Projections are anticipated cash transactions for remaining FY24 activity (includes FY24 accruals to be paid/rec'd after 06/30/24).
- 3 FY24 Budget based upon the approved October 2023 approved budget.
- 4 Projected enrollment is based on the expected enrollment of the school.
- 5 Projected State Revenue variance aligns with the most recent payment information from ODE

The information in this report is based upon pre-audit accounting to facilitate ongoing financial management and planning.



Financial Report – November 2023

Equity Position

The chart below outlines the balance sheet totals for the current and prior year months. All of the information in this financial report is based upon pre-audit estimates using available information as of December 13, 2023. GASB 68 pension liability entries are not included in this Balance Sheet Summary as they are not a legal liability for the School. This information should not be used for official financial analysis or reporting. It is provided solely for the use of the Board and Administration to facilitate future financial planning.

Near West Intergenerational School Balance Sheet Summary November 2023 and November 2022

ASSETS	11/30/2023	11/30/2022	\$ Change
Current Assets			
Cash	\$ 4,237,861	\$ 3,187,076	\$ 1,050,785
Accounts Receivable(1)	38,410	183,016	(144,606)
IGC Receivable	-	-	-
Other Current Assets	-	-	-
Total Current Assets	4,276,271	3,370,092	906,179
Non-Current Assets			
Capital Assets, net	36,387	47,477	(11,090)
Other Non-Current Assets	-	-	-
Total Non-Current Assets	36,387	47,477	(11,090)
TOTAL ASSETS	\$ 4,312,658	\$ 3,417,569	\$ 895,089
LIABILITIES			
Current Liabilities			
Accounts Payable (2)	\$ 95,923	\$ 249,116	\$ (153,193)
Wages & Benefits Payable (3)	180,878	119,680	61,198
Loan Payable	-	-	-
Total Current Liabilities	276,802	368,796	(91,994)
Non-Current Liabilities			
Note Payable	-	-	-
Other Non-Current Liabilities	-	-	-
Total Non-Current Liabilities	-	-	-
TOTAL LIABILITIES	\$ 276,802	\$ 368,796	\$ (91,994)
NET EQUITY			
Net Assets			
Invested in Capital Assets, net	36,387	47,477	(11,090)
Restricted	43,027	85,574	(42,547)
Unrestricted	3,956,442	2,915,722	1,040,720
TOTAL NET ASSETS (4)	4,035,856	3,048,773	987,083
TOTAL LIABILITIES & NET ASSETS	\$ 4,312,658	\$ 3,417,569	\$ 895,089

Notes

- (1) Accounts Receivables include CCIP/Title reimbursements.
In November 22 we had not yet received funds from the FY22 FER.
- (2) Year over year decrease in Accounts Payable is due to process refinements.
- (3) Wage and Benefits Obligations include stretch pay for teachers and associated benefits.
- (4) Total Net Assets are preliminary estimates based upon pre-audit financial information.

The information in this report is based upon pre-audit accounting to facilitate ongoing financial management and planning.



Financial Report – November 2023

Key Financials:

(in \$thousands)

- o YTD Core Program Net Income +\$180
- o FY24 Core Program Projected Net Income (\$142)
- o FY24 Core Program Projected Budget Variance (\$429)
- o Month-end Cash Balance +\$1,739
- o Unrestricted Net Assets +\$1,453

Fiscal Health:

CMSD Benchmarks		CMSD Standard	LIS	Status
Liquidity Ratio Index	$\frac{\text{Current Assets}}{\text{Current Liabilities}}$	1.0 to 1.1	4.65	Exceeds
Operating Cash Ratio	$\frac{\text{Total Cash}}{\text{Avg. Monthly Exp.}}$	1.0 to 2.0 Months Cash	7.32 months	Exceeds
Reserve Ratio Index	$\frac{\text{Fund Balance}}{\text{Avg. Monthly Exp.}}$	0.40 to 0.75	6.12 months	Exceeds
FTE Variance - November 2023	$\frac{\text{Actual FTE}}{\text{Budgeted FTE}}$	90.0%-94.9% of Budget	82.5%	Below

Note: Fund Balance is equal to Unrestricted Net Assets plus Net income.

Treasurer Notes:

o **FY24 Projection**

Lakeshore Intergenerational School's FY24 surplus through November was \$100,429. The year-end surplus is projected to be \$378,950 based upon anticipated receipts and disbursements. FY24 Core Program Receipts are projected to be \$2,237,037, an unfavorable (\$542,032) budget variance. The Core Program Expenses for FY24 are projected to be (\$2,378,846), a favorable \$112,876 budget variance. As a result, the projected FY24 core budget variance is an unfavorable (\$429.156) based upon current revenue and expense assumptions.

o **Planning for Fiscal Year 2025**

The planning for the 2024-2025 school year is underway. Establishing board priorities and goals in student learning growth, enrollment, finance, facilities, technology, etc. will help in creating a school plan for the 2024-2025 school year that is aligned to the school's long-term vision.

o **State Revenue Projections**

The projected state revenues in this report are updated based on the most recent State Foundation Payment reports from the Ohio Department of Education and Workforce. Projected revenues may fluctuate greatly from month to month based on the school's student data, especially the economically disadvantaged population. We are anticipating a large payment in January from the state for High Quality Community School funding.

Proposed Board Action Items:

- 1) Continue discussions related to the need to ramp up philanthropic support.

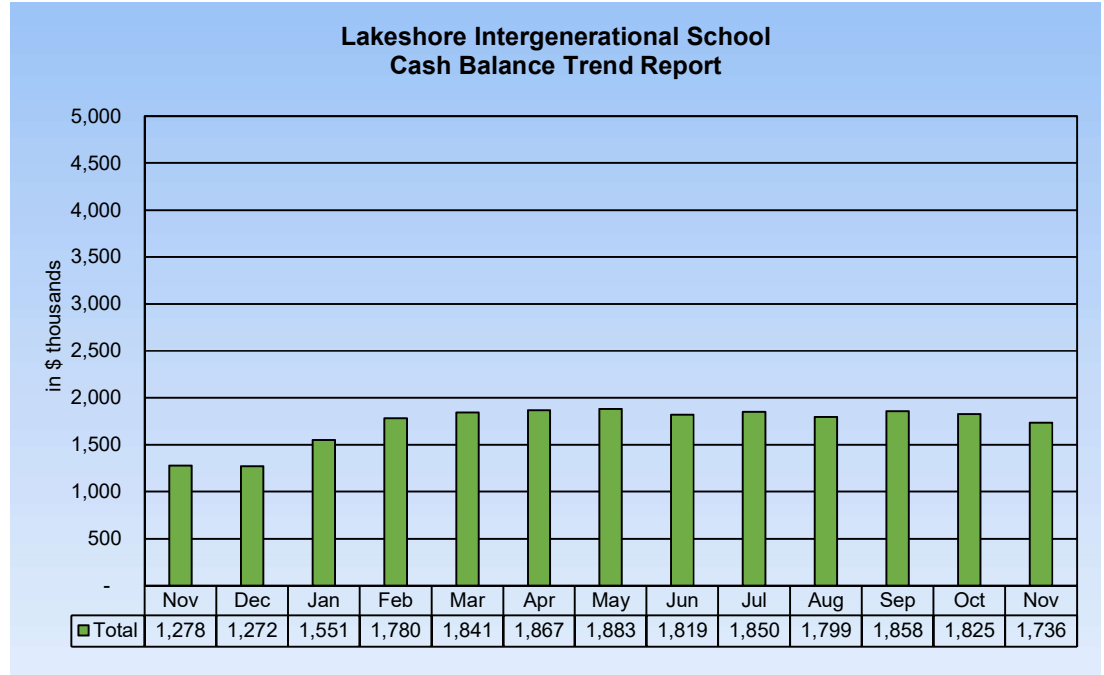


Financial Report – November 2023

Cash Position

The total cash balance for the Lakeshore Intergenerational School was \$1,739,365 at the end of November. Unrestricted Funds closed the month at \$1,851,332. The Restricted Funds closed the month at (\$111,967). Cash flow trend details for the past 13 months are provided on the chart below.

MONTH END CASH BALANCE DETAIL	
<i>Unrestricted Funds</i>	
General	\$ 2,238,381
Food	(107,050)
IGC Expense	(280,000)
Subtotal	\$ 1,851,332
<i>Restricted Funds</i>	
Parent Group	3,252
Wellness	11,534
Safety Grant	2,500
ARP IDEA	(12,063)
ESSER 3	(79,701)
MIS	(2,494)
Schoolwide	(23,799)
Athletic Fund	(5,180)
Title VI-B	(15,516)
Playground	9,500
Subtotal	\$ (111,967)
Total	\$ 1,739,365



Bank Reconciliation

The table below provides a summary of Lakeshore Intergenerational School reconciliation for the period ending November 30, 2023. The ending book balance was \$1,739,365. The ending bank statement balance was \$1,746,077. Outstanding checks (checks that have been sent, but not yet cashed) totaled \$6,712. Monthly interest from the STAR Ohio account was \$7,770.

Lakeshore Intergenerational School	
November 30, 2023	
Book Balance	
Beginning Book Balance	\$ 1,825,210
Ending Book Balance	\$ 1,739,365
Bank Balance	
Key Bank Balance	68,147
STAR Ohio Balance	1,677,930
Ending Bank Balance	\$ 1,746,077
Outstanding Checks	6,712
Reconciled Cash Balance	\$ 1,739,365

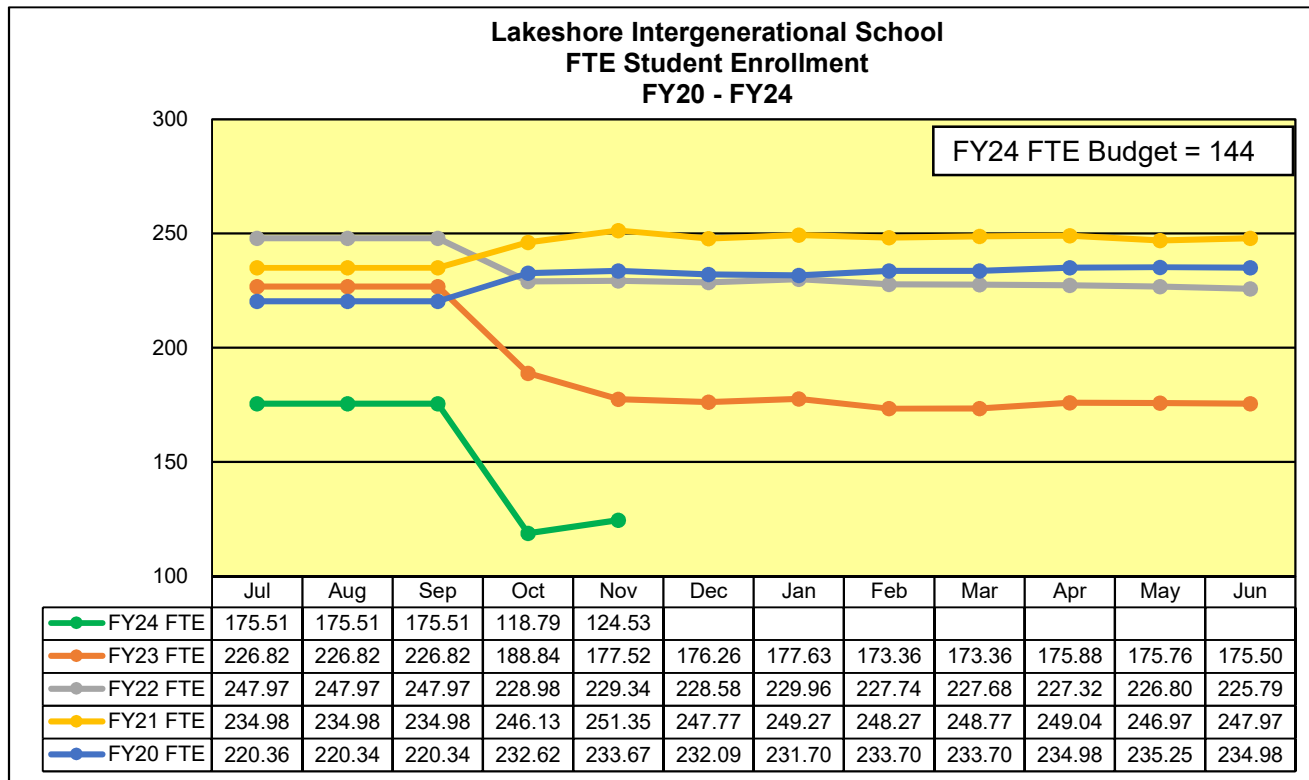
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Financial Report – November 2023

Student Enrollment

The chart below provides a trend line summary of Full Time Equivalent (FTE) student enrollment. The October Foundation Report reflects the change in FTE's for the new school year. The FTE totals for subsequent months are based upon FTE student data as reported by the Ohio Department of Education through the monthly State Settlement reports. LIS enrollment was 124.53 in November, which is 19.47 FTE below budget.



Federal Programs

The chart below provides a summary of the Lakeshore Intergenerational School Consolidated Federal Programs (CCIP). Allocations are earmarked for salaries, benefits and professional development services. The CCIP allocation for FY24 is \$813,985. Disbursements have totaled \$261,340 year-to-date. Receipts have totaled \$142,324 year-to-date.

Lakeshore Intergenerational School CCIP - Federal Education Programs						
Federal Program	Schoolwide		IDEA-B		ESSER 3	Totals
FY24 Allocation	\$ 525,795		\$ 42,695		\$ 245,495	\$ 813,985
YTD Receipts	142,324		-		-	142,324
YTD Disbursements	166,123		15,516		79,701	261,340
Fund Balance	(23,799)		(15,516)		(79,701)	(119,016)
Encumbered Funds	359,071		34,738		171,566	565,375
Allocation Balance	\$ -		\$ -		\$ -	\$ -

The information in this report is based upon pre-audit accounting to facilitate ongoing financial management and planning.



Financial Report – November 2023

FY24 Projection

Lakeshore Intergenerational School's FY24 surplus through November was \$100,429. The year-end surplus is projected to be \$378,950 based upon anticipated receipts and disbursements. FY24 Core Program Receipts are projected to be \$2,237,037, an unfavorable (\$542,032) budget variance. The Core Program Expenses for FY24 are projected to be (\$2,378,846), a favorable \$112,876 budget variance. As a result, the projected FY24 core budget variance is an unfavorable (\$429,156) based upon current revenue and expense assumptions.

	YTD Actual (1)	FY24 Projection (2)	FY24 Act + Proj	FY24 Budget (3)	Budget Variance
FTE ENROLLMENT (4)	118.79	5.78	124.57	144.00	(19.43)
REVENUE					
State Foundation (excl SPED)	\$ 566,997	\$ 653,416	\$ 1,220,412	\$ 1,410,768	\$ (190,356)
CCIP Funding (excl Title VI-B) (5)	-	131,449	131,449	627,219	(495,770)
Facilities Funding	60,675	63,895	124,570	38,037	86,533
Property Tax Levy	81,083	123,402	204,485	204,485	-
Casino	5,621	13,381	19,002	19,002	0
Charter School Equity Supplement	33,728	47,243	80,971	93,600	(12,630)
BASE REVENUE	748,103	1,032,785	1,780,889	2,393,111	(612,222)
State Foundation SPED (6)	61,236	81,847	143,083	193,083	(50,000)
Title VI-B	-	42,695	42,695	47,234	(4,539)
Food Funding	9,624	131,727	141,351	141,351	-
Other Revenues	53,758	75,261	129,019	4,291	124,729
OTHER REVENUE	124,618	331,530	456,149	385,959	70,190
TOTAL REVENUE	872,722	1,364,316	2,237,037	2,779,069	(542,032)
EXPENSES					
Instruction Staff (7)	\$ (211,989)	\$ (596,899)	\$ (808,888)	\$ (945,844)	\$ 136,956
Admin/Ops Staff (7)	(150,537)	(333,949)	(484,487)	(619,639)	135,152
Purchased Services - Food	(25,711)	(118,940)	(144,651)	(144,651)	-
Purchased Services - Special Education	(22,187)	(94,213)	(116,400)	(94,700)	(21,700)
Purchased Services - Facilities	(31,029)	(76,606)	(107,634)	(82,933)	(24,701)
Purchased Services - Consulting (8)	(79,900)	(269,760)	(349,660)	(241,776)	(107,884)
Purchased Services - Other	(41,084)	(123,306)	(164,391)	(164,040)	(351)
Supplies	(27,416)	(141,694)	(169,110)	(167,464)	(1,646)
Other Expenses	(15,238)	(18,387)	(33,625)	(30,675)	(2,950)
TOTAL EXPENSES	(605,092)	(1,773,755)	(2,378,846)	(2,491,722)	112,876
SURPLUS/DEFICIT	\$ 267,630	\$ (409,439)	\$ (141,809)	\$ 287,347	\$ (429,156)
EXTRAORDINARY REVENUE & EXPENSES					
Rent	(87,500)	(132,500)	(220,000)	(220,000)	-
Facilities & Equipment	-	-	-	-	-
IGC Base Support	-	220,000	220,000	220,000	-
HQ School Funding	-	526,530	526,530	526,530	-
SURPLUS/DEFICIT incl Extraordinary Items	\$ 180,130	\$ 204,591	\$ 384,721	\$ 813,877	\$ (429,156)
ESSER Revenues	-	245,495	245,495	245,495	-
ESSER Expenses	(79,701)	(171,566)	(251,267)	(159,512)	(91,755)
SURPLUS/DEFICIT incl ESSER	\$ 100,429	\$ 278,521	\$ 378,950	\$ 899,860	\$ (520,910)

Notes

- 1 YTD Actuals are cash transactions for FY24 activities for the period of 07/01/23 to 11/30/23 (excludes FY23 activity).
- 2 FY24 Projections are anticipated cash transactions for remaining FY24 activity (includes FY24 accruals to be paid/rec'd after 06/30/24).
- 3 FY24 Budget based upon the approved October approved budget.
- 4 Projected enrollment is based on the expected enrollment of the school.
- 5 Projected CCIP revenue shortfall is due to actual allocations from ODE
- 6 Projected SPED revenue adjusted to reflect annual amount
- 7 Staffing budget variance is due to positions which were eliminated given current enrollment

The information in this report is based upon pre-audit accounting to facilitate ongoing financial management and planning.



Financial Report – November 2023

Equity Position

The chart below outlines the balance sheet totals for the current and prior year months. All of the information in this financial report is based upon pre-audit estimates using available information as of December 13, 2023. GASB 68 pension liability entries are not included in this Balance Sheet Summary as they are not a legal liability for the School. This information should not be used for official financial analysis or reporting. It is provided solely for the use of the Board and Administration to facilitate future financial planning.

Lakeshore Intergenerational School Balance Sheet Summary November 2023 and November 2022

ASSETS	11/30/2023	11/30/2022	\$ Change
Current Assets			
Cash	\$ 1,739,365	\$ 1,278,030	\$ 461,335
Accounts Receivable (1)	131,079	192,938	(61,859)
IGC Receivable	-	-	-
Other Current Assets	-	-	-
Total Current Assets	1,870,444	1,470,968	399,476
Non-Current Assets			
Capital Assets, net	-	-	-
Other Non-Current Assets	-	-	-
Total Non-Current Assets	-	-	-
TOTAL ASSETS	\$ 1,870,444	\$ 1,470,968	\$ 399,476
LIABILITIES			
Current Liabilities			
Accounts Payable	283,746	311,070	(27,324)
Wages & Benefits Payable (2)	118,833	70,936	47,897
Loan Payable	-	-	-
Total Current Liabilities	402,579	382,006	20,573
Non-Current Liabilities			
Note Payable	-	-	-
Other Non-Current Liabilities	-	-	-
Total Non-Current Liabilities	-	-	-
TOTAL LIABILITIES	\$ 402,579	\$ 382,006	\$ 20,573
NET EQUITY			
Net Assets			
Invested in Capital Assets, net	-	-	-
Restricted	14,792	46,200	(31,408)
Unrestricted	1,453,073	1,042,762	410,311
TOTAL NET ASSETS (3)	1,467,865	1,088,962	378,903
TOTAL LIABILITIES & NET ASSETS	\$ 1,870,444	\$ 1,470,968	\$ 399,476

Notes

- 1 Accounts Receivables include CCIP/Title reimbursements.
- 2 Wage and Benefits Obligations include stretch pay for teachers and payroll tax liabilities.
- 3 Total Net Assets are preliminary estimates based upon pre-audit financial information

The information in this report is based upon pre-audit accounting to facilitate ongoing financial management and planning.



Financial Report – November 2023

Key Financials:

(in \$thousands)

o YTD Net Income	(\$136)
o FY24 Projected Net Income	(\$398)
o FY24 Projected Budget Variance	(\$304)
o Month-end Cash Balance	+\$1,035
o Unrestricted Net Assets	+\$1,170

Fiscal Health:

Benchmarks		IGC
Liquidity Ratio Index	$\frac{\text{Current Assets}}{\text{Current Liabilities}}$	-42.85
Operating Cash Ratio	$\frac{\text{Total Cash}}{\text{Avg. Monthly Exp.}}$	16.64 months
Reserve Ratio Index	$\frac{\text{Fund Balance}}{\text{Avg. Monthly Exp.}}$	18.79 months

Note: Fund Balance is equal to Unrestricted Net Assets plus Net income.

Treasurer Notes:

o **FY24 Projection**

Intergenerational Cleveland's FY24 deficit through November was (\$136,231). The year-end deficit is projected to be (\$397,732) based upon anticipated receipts and disbursements. FY24 Core Program Receipts are projected to be \$349,097, a favorable (\$270,403) budget variance. The Core Program Expenses for FY24 are projected to be (\$416,828), an unfavorable (\$33,388) budget variance. As a result, the projected FY24 core budget variance is an unfavorable (\$303,792) based upon current revenue and expense assumptions.

o **Cash Flow**

The cash balance for IGC decreased by \$26,517 in November. Near-term cash balances are expected to decrease based on projected operating expenses and expected fundraising.

o **Expected Fundraising Revenue**

Direct support revenues are projected to be materially lower than budget. We anticipate a \$200,000 annual gift from Perkins Malo Hunter and total receipts of \$75,000 from other funders, sourced by InBloom.

Proposed Board Action Items:

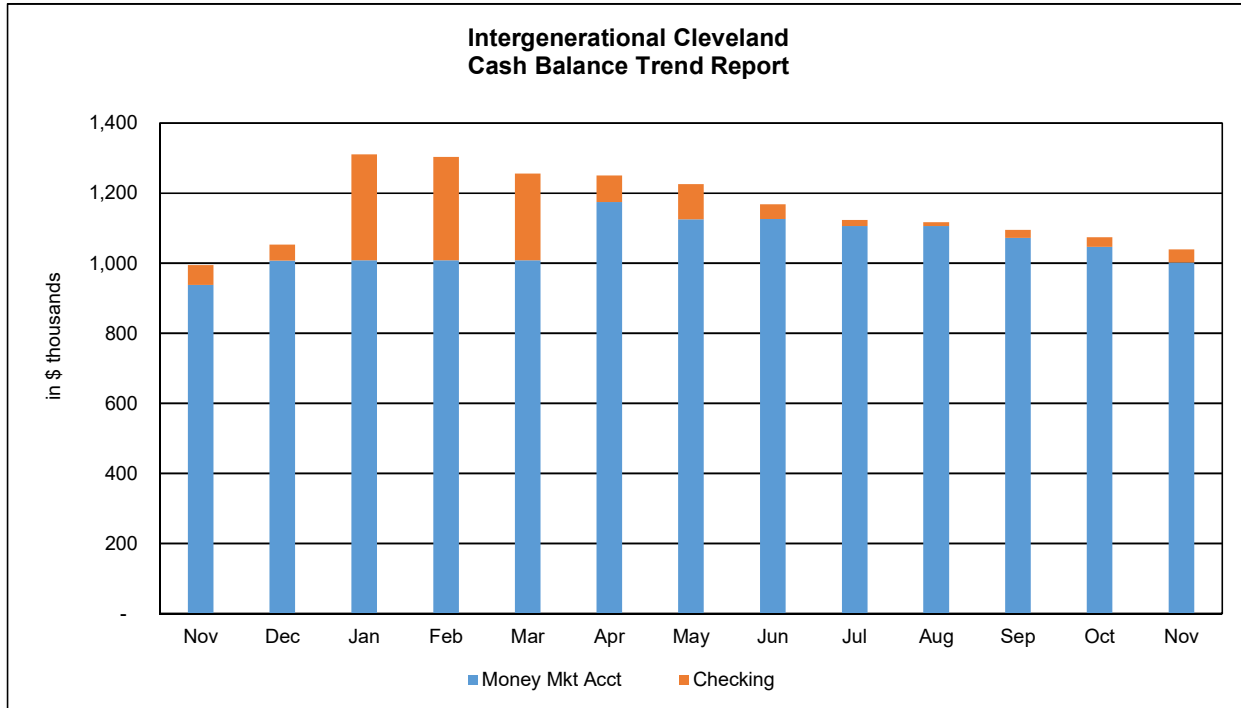
- 1) Continue planning related to IGC long-term financial goals, including specific benchmarks related to revenue generation and/or expenses reduction objectives for FY24.



Financial Report – November 2023

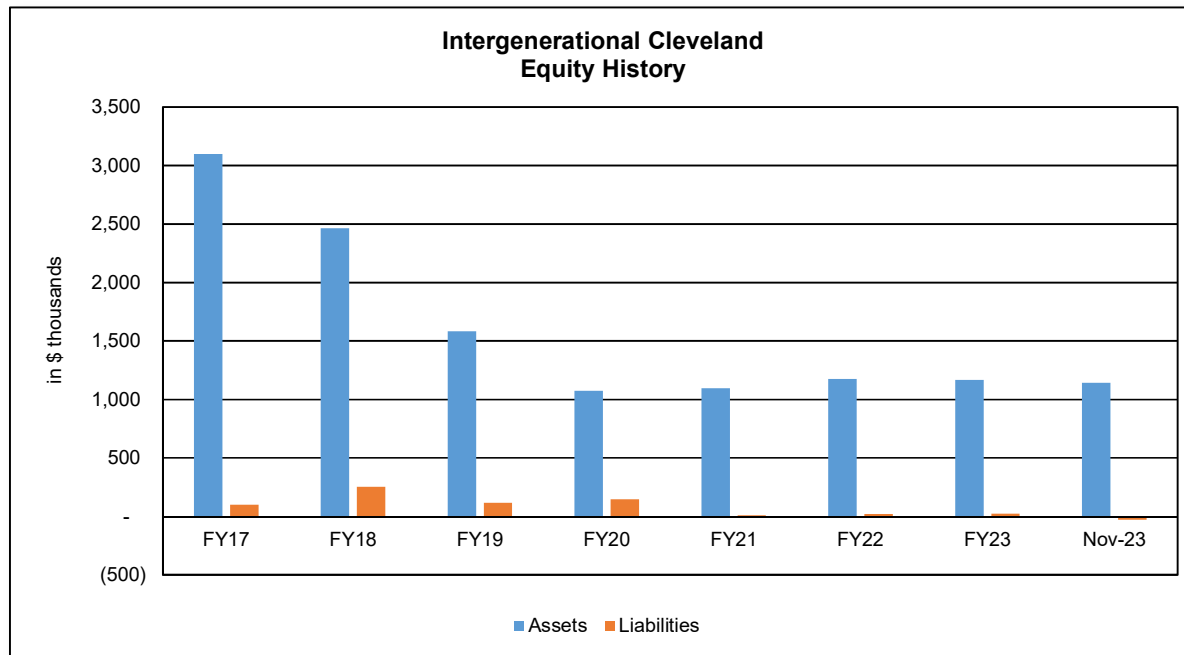
Cash Position

The chart below provides the month-end cash balances for IGC over the past 13 months. Cash balances are expected to decrease during the remainder of Fiscal Year based on the current operating revenue and expense projections.



Equity Position History

The chart below outlines the IGC balance sheet totals based upon prior financial reports for Fiscal Year 2017 through Oct 2023. Both assets and liabilities reduced significantly during FY17 to FY20 as a result of Base Support distributions to the schools. FY24 & Oct 2024 is based upon pre-audit financials.



The information in this report is based upon pre-audit accounting to facilitate ongoing financial management and planning.



Financial Report – November 2023

FY24 Projection

Intergenerational Cleveland's FY24 deficit through November was (\$136,231). The year-end deficit is projected to be (\$397,732) based upon anticipated receipts and disbursements. FY24 Core Program Receipts are projected to be \$349,097, a favorable (\$270,403) budget variance. The Core Program Expenses for FY24 are projected to be (\$416,828), an unfavorable (\$33,388) budget variance. As a result, the projected FY24 core budget variance is an unfavorable (\$303,792) based upon current revenue and expense assumptions.

	YTD Actual (1)	FY24 Projection (2)	FY24 Act + Proj	FY24 Budget (3)	Budget Variance
REVENUE					
Direct Support (4)	\$ 6,427	\$ 268,573	\$ 275,000	\$ 550,000	\$ (275,000)
School Revenues	-	69,500	\$ 69,500	69,500	-
Other Revenues	1,915	2,681	\$ 4,597	-	4,597
TOTAL REVENUE	8,342	340,754	349,097	619,500	(270,403)
EXPENSES					
Admin/Ops Staff	\$ (20,208)	\$ (34,712)	\$ (54,920)	\$ (54,920)	\$ -
Purchased Services (excl rent)	(88,869)	(225,533)	\$ (314,402)	(311,700)	(2,702)
Supplies	(21,317)	(10,610)	\$ (31,927)	(10,270)	(21,657)
Other Expenses	(14,180)	(1,400)	\$ (15,580)	(6,550)	(9,030)
TOTAL EXPENSES	(144,574)	(272,255)	(416,828)	(383,440)	(33,388)
CORE PROGRAM SURPLUS/DEFICIT	\$ (136,231)	\$ 68,499	\$ (67,732)	\$ 236,060	\$ (303,792)
EXTRAORDINARY REVENUE & EXPENSES					
IGC Base Support	\$ -	(330,000)	\$ (330,000)	(330,000)	-
SURPLUS/DEFICIT incl Extraordinary Item	\$ (136,231)	\$ (261,501)	\$ (397,732)	\$ (93,940)	\$ (303,792)

Notes

- 1 YTD Actuals are cash transactions for FY24 activities for the period of 07/01/23 to 11/30/23 (excludes FY23 activity).
- 2 FY24 Projections are anticipated cash transactions for remaining FY24 activity (includes FY24 accruals to be paid/rec'd after 06/30/24).
- 3 FY24 Budget is based upon May approved budget.
- 4 Projected IGC Revenues have been reduced based on year-to-date receipts and the expected annual Perkins Malo Hunter gift



Financial Report – November 2023

Equity Position

The chart below outlines the balance sheet totals for the current and prior year months. All of the information in this financial report is based upon pre-audit estimates using available information as of December 13, 2023. This information should not be used for official financial analysis or reporting. It is provided solely for the use of the Board and Administration to facilitate future financial planning.

**Intergenerational Cleveland
Balance Sheet Summary
November 2023 and November 2022**

ASSETS	11/30/2023	11/30/2022	\$ Change
Current Assets			
Cash	\$ 1,035,475	\$ 995,158	\$ 40,317
Accounts Receivable	106,241	112,781	(6,540) 1
Intranetwork Receivable	1,252	1,252	0
Other Current Assets	-	-	-
Total Current Assets	1,142,968	1,109,191	33,777
Non-Current Assets			
Capital Assets, net	173	158	15
Other Non-Current Assets	-	-	-
Total Non-Current Assets	173	158	15
TOTAL ASSETS	\$ 1,143,141	\$ 1,109,349	\$ 33,792
LIABILITIES			
Current Liabilities			
Accounts Payable	(34,789)	72,561	(107,350)
Wages & Benefits Payable	8,114	5,635	2,479
Other Current Liabilities	-	-	-
Total Current Liabilities	(26,676)	78,196	(104,872)
Non-Current Liabilities			
Note Payable	-	-	-
Other Non-Current Liabilities	-	-	-
Total Non-Current Liabilities	-	-	-
TOTAL LIABILITIES	\$ (26,676)	\$ 78,196	\$ (104,872)
NET EQUITY			
Net Assets			
Invested in Capital Assets, net	173	158	15
Restricted	-	15,000	(15,000)
Unrestricted	1,169,644	1,015,995	153,649
TOTAL NET ASSETS	1,169,817	1,031,153	138,664 2
TOTAL LIABILITIES & NET ASSETS	\$ 1,143,141	\$ 1,109,349	\$ 33,792

Notes

- 1 Accounts Payable include support payments receivable by network schools.
- 2 Total Net Assets are preliminary estimates based upon pre-audit financial information.

The information in this report is based upon pre-audit accounting to facilitate ongoing financial management and planning.



Financial Report – October 2023

Key Financials (in \$000s)	Schools Total	TIS	NWIS	LIS		IGC
YTD Core Program Net Income	+\$417	(\$10)	+\$246	+\$180		(\$136)
Projected FY24 Core Program Net Income	(470)	(597)	+269	(142)		(398)
Projected FY24 Core Program Budget Variance	(1,585)	(1,526)	+371	(429)		(304)
Month-End Cash Balance	+7,903	+1,926	+4,238	+1,739		+1,035
Unrestricted Net Assets	+\$7,240	+\$1,831	+\$3,956	+\$1,453		+\$1,170

Fiscal Health Benchmarks		CMSD Standard	TIS	NWIS	LIS		IGC
Liquidity Ratio Index	$\frac{\text{Current Assets}}{\text{Current Liabilities}}$	1.0 to 1.1	7.02	15.45	4.65		-42.85
Operating Cash Ratio	$\frac{\text{Total Cash}}{\text{Avg. Monthly Exp.}}$	1.0 to 2.0 Months Cash	5.29 months	14.39 months	7.32 months		16.64 months
Reserve Ratio Index	$\frac{\text{Fund Balance}}{\text{Avg. Monthly Exp.}}$	0.40 to 0.75	5.03 months	13.44 months	6.12 months		18.79 months
November 2023 FTE Variance	$\frac{\text{Actual FTE}}{\text{Budgeted FTE}}$	90.0%-94.9% of Budget	93.7%	93.7%	82.5%		---

Note: Fund Balance is equal to Unrestricted Net Assets plus Net income

IG Finance Advisory Committee Notes

- FY24 Network Projections

The chart below provides the projected core program and the extraordinary revenues/expenses for TIS, NWIS, LIS and IGC for Fiscal Year 2024. Total FY24 core program revenues for all three schools are projected to be \$8,893,265 while core program expenses are projected to be \$9,362,856. After extraordinary items and ESSER funds are included, the combined year-end core program surplus is projected to be \$1,267,941. A detailed budget-to-actual analysis is included within each organization's Monthly Financial Report.

- Planning for Fiscal Year 2025

With the 2023-2024 school year underway, it is imperative to look ahead to the 2024-2025 school year. Establishing board priorities and goals in student learning growth, enrollment, finance, facilities, technology, etc. will help in creating a school plan for the 2024-2025 school year that is aligned to the school's long-term vision.

- State Revenue Projections

The projected state revenues in this report are updated based on the most recent State Foundation Payment reports from the Ohio Department of Education and Workforce. Projected revenues may fluctuate greatly from month to month based on the school's student data, especially the economically disadvantaged population. We are anticipating a large payment in January from the state for High Quality Community School funding.

Board Action Items

- 1) Continue discussions related to the need to ramp up philanthropic support.



Financial Report – October 2023

FY23 Projection

The chart below provides the projected core program and the extraordinary revenues/expenses for TIS, NWIS, LIS and IGC for Fiscal Year 2024. Total FY24 core program revenues for all three schools are projected to be \$8,893,265 while core program expenses are projected to be \$9,362,856. After extraordinary items and ESSER funds are included, the combined year-end core program surplus is projected to be \$1,267,941. A detailed budget-to-actual analysis is included within each organization's Monthly Financial Report.

Model Rollup (1)	TIS	NWIS	LIS	Total	IGC
FTE ENROLLMENT (2)	209.56	212.88	124.57	547.01	
REVENUE					
State Foundation (excl SPED) (3)	\$ 1,717,116	\$ 2,423,350	\$ 1,220,412	\$ 5,360,878	\$ -
CCIP Funding (excl Title VI-B)	183,531	136,834	131,449	451,813	-
Facilities Funding	209,560	238,000	124,570	572,130	-
Property Tax Levy	-	178,288	204,485	382,773	-
Casino	19,322	17,827	19,002	56,152	-
Charter School Equity Supplement	136,214	152,320	80,971	369,505	-
BASE REVENUE	2,265,742	3,146,619	1,780,889	7,193,250	-
State Foundation SPED (3)	253,607	223,526	143,083	620,216	-
Title VI-B	50,696	58,816	42,695	152,207	-
Food Funding	158,411	102,039	141,351	401,801	-
Other Revenues	160,240	236,532	129,019	525,791	349,097
OTHER REVENUE	622,954	620,913	456,149	1,700,015	349,097
TOTAL REVENUE	2,888,696	3,767,532	2,237,037	8,893,265	349,097
EXPENSES					
Instruction Staff	\$ (1,239,998)	\$ (1,937,554)	\$ (808,888)	\$ (3,986,439)	\$ -
Admin/Ops Staff	(661,646)	(560,565)	(484,487)	(1,706,698)	(54,920)
Purchased Services - Food	(158,411)	(111,750)	(144,651)	(414,812)	-
Purchased Services - Special Education	(180,667)	(287,834)	(116,400)	(584,901)	-
Purchased Services - Facilities	(343,400)	(157,007)	(107,634)	(608,041)	-
Purchased Services - Consulting	(370,307)	(145,574)	(349,660)	(865,541)	(314,402)
Purchased Services - Other	(263,421)	(187,704)	(164,391)	(615,515)	-
Supplies	(195,677)	(82,410)	(169,110)	(447,197)	(31,927)
Other Expenses	(72,361)	(27,725)	(33,625)	(133,711)	(15,580)
TOTAL EXPENSES	(3,485,887)	(3,498,122)	(2,378,846)	(9,362,856)	(416,828)
CORE PROGRAM SURPLUS/(DEFICIT)	\$ (597,191)	\$ 269,409	\$ (141,809)	\$ (469,591)	\$ (67,732)
EXTRAORDINARY REVENUE & EXPENSES					
Rent & Mortgage	(74,842)	(35,000)	(220,000)	(329,842)	-
Facilities & Equipment	-	-	-	-	-
IGC Base Support (4)	74,842	35,000	220,000	329,842	(330,000)
HQ School Funding	628,680	639,630	526,530	1,794,840	-
SURPLUS/(DEFICIT) after extraordinary	\$ 31,489	\$ 909,039	\$ 384,721	\$ 1,325,249	\$ (397,732)
ESSER Revenues	758,703	-	245,495	1,004,198	-
ESSER Expenses	(810,239)	-	(251,267)	(1,061,506)	-
SURPLUS/DEFICIT after ESSER	\$ (20,048)	\$ 909,039	\$ 378,950	\$ 1,267,941	\$ (397,732)
PER STUDENT REVENUES	\$ 13,785	\$ 17,698	\$ 17,958	\$ 16,258	
PER STUDENT EXPENSES	\$ (16,634)	\$ (16,432)	\$ (19,096)	\$ (17,116)	

Notes

- 1 Projections include FY24 accruals projected to be paid after 06/30/24.
- 2 Projected Enrollment is based on school expected year-end FTE
- 3 Projected state foundation revenue reflects current school year December FTEs
- 4 Projected FY24 IGC Donations are based upon contributions toward FY24 Rent & Mortgage, Facilities & Equipment

The information in this report is based upon pre-audit accounting to facilitate ongoing financial management and planning.



Financial Report – October 2023

Equity Position

The chart below outlines the balance sheet totals based upon current accounting records. All of the information in this financial report is based upon pre-audit estimates using available information as of December 13, 2023. GASB 68 pension liability entries are not included in this Balance Sheet Summary as they are not a legal liability for the School. This information should not be used for official financial analysis or reporting. It is provided solely for the use of the Board and Administration to facilitate future financial planning.

**The Intergenerational Schools
Balance Sheet Summary
November 30, 2023**

ASSETS	TIS	NWIS	LIS	Total	IGC
Current Assets					
Cash (1)	\$ 1,925,560	\$ 4,237,861	\$ 1,739,365	\$ 7,902,786	\$ 1,035,475
Accounts Receivable	198,299	38,410	131,079	367,788	106,241
Intranetwork Receivable	10,880	-	-	10,880	1,252
Other Current Assets	-	-	-	-	-
Total Current Assets	2,134,739	4,276,271	1,870,444	8,281,454	1,142,968
Non-Current Assets					
Capital Assets, net	1,258,679	36,387	-	1,295,066	173
Other Non-Current Assets	-	-	-	-	-
Total Non-Current Assets	1,258,679	36,387	-	1,295,066	173
TOTAL ASSETS	\$ 3,393,419	\$ 4,312,658	\$ 1,870,444	\$ 9,576,520	\$ 1,143,141
LIABILITIES					
Current Liabilities					
Accounts Payable	112,155	95,923	283,746	\$ 491,824	(34,789)
Wages and Benefits Payable (2)	155,633	180,878	118,833	455,344	8,114
Other Current Liabilities	36,415	-	-	36,415	-
Total Current Liabilities	304,203	276,802	402,579	983,584	(26,676)
Non-Current Liabilities					
Loan Payable	880,072	-	-	880,072	-
Capital Lease Payable	-	-	-	-	-
Total Non-Current Liabilities	880,072	-	-	880,072	-
TOTAL LIABILITIES	\$ 1,184,275	\$ 276,802	\$ 402,579	\$ 1,863,655	\$ (26,676)
NET EQUITY					
Net Assets (3)					
Temp. Restricted - Capital	342,193	36,387	-	378,580	173
Other Restricted	36,342	43,027	14,792	94,161	-
Unrestricted Net Assets	1,830,610	3,956,442	1,453,073	7,240,124	1,169,644
TOTAL NET ASSETS (4)	2,209,144	4,035,856	1,467,865	7,712,865	1,169,817
TOTAL LIABILITIES AND NET ASSETS	\$ 3,393,419	\$ 4,312,658	\$ 1,870,444	\$ 9,576,520	\$ 1,143,141

Notes

- 1 Cash balances are based upon reconciled bank statements.
- 2 Wage and Benefits Obligations include stretch pay for staff and payroll tax liabilities.
- 3 Net Assets do not include GASB 68 pension liabilities since they are not a legal responsibility of the School.
- 4 Total Net Assets are preliminary estimates based upon pre-audit financial information.

The information in this report is based upon pre-audit accounting to facilitate ongoing financial management and planning.

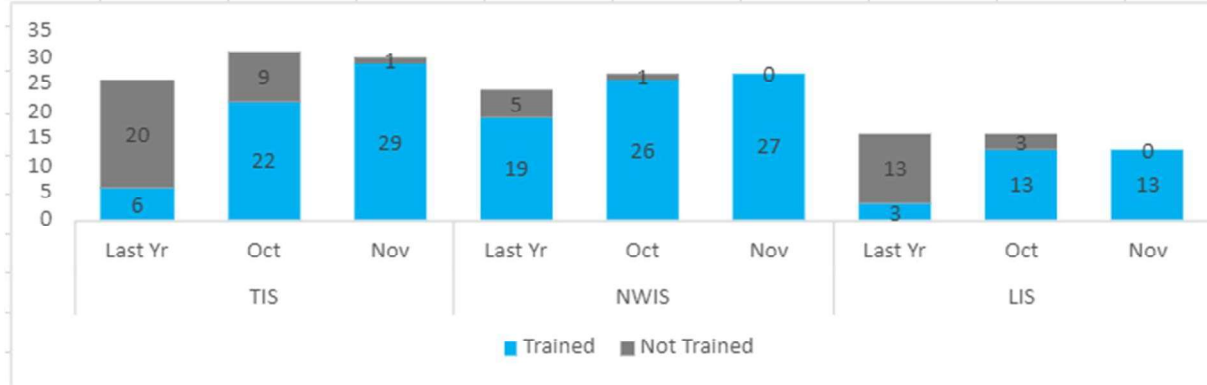
Coversheet

Dashboards

Section: VIII. Strategic Plan Indicators and Dashboards
Item: A. Dashboards
Purpose: Discuss
Submitted by:
Related Material: Board Goals 1-3 Combined.pdf

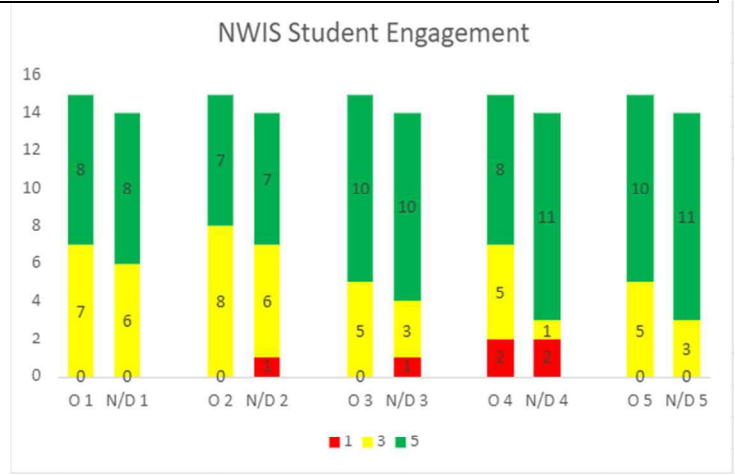
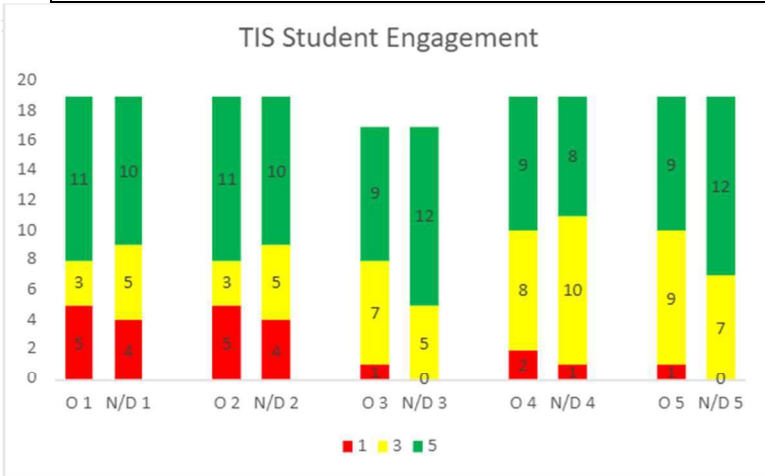
Goal 1 Board Dashboard

Responsive Classroom Staff Formally Trained: Key Indicator of School Climate and Culture



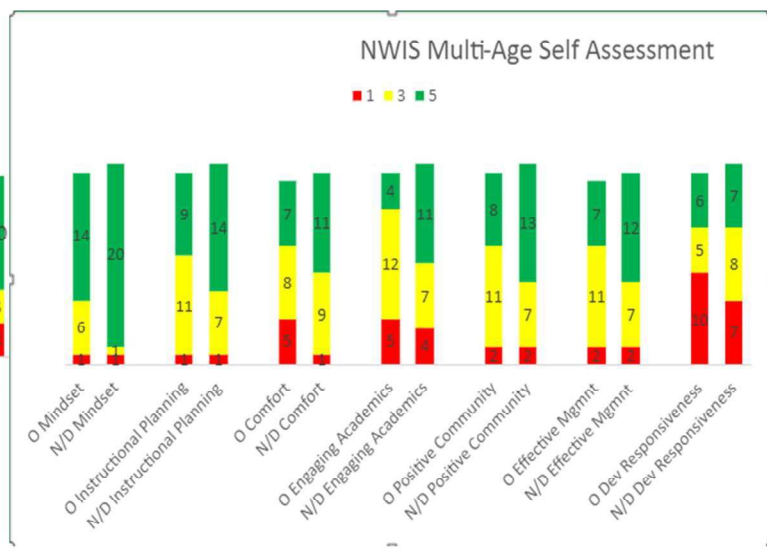
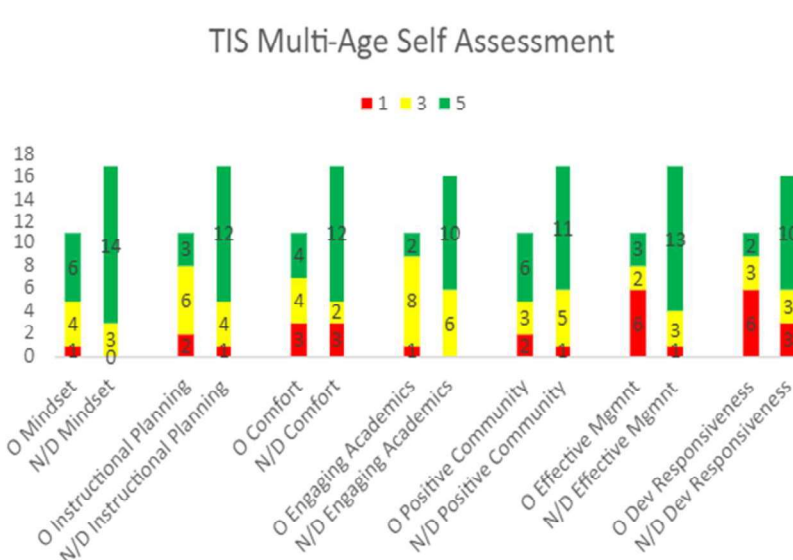
Student Engagement: Key Indicator for Academic Success

Measured Using Resp CR Rubric for "Engaging Academics" in 5 Areas:
 1. Foster Participation 2. Individualization 3. Student Discussion 4. Transition to Work Time 5. Teacher as Guide

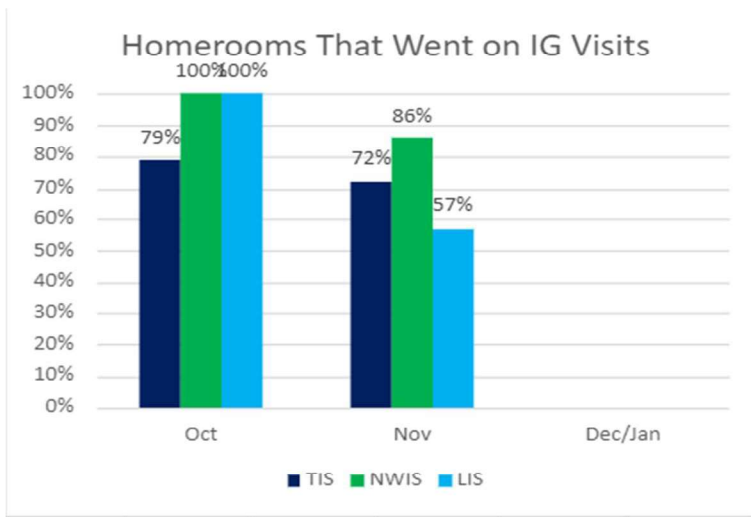
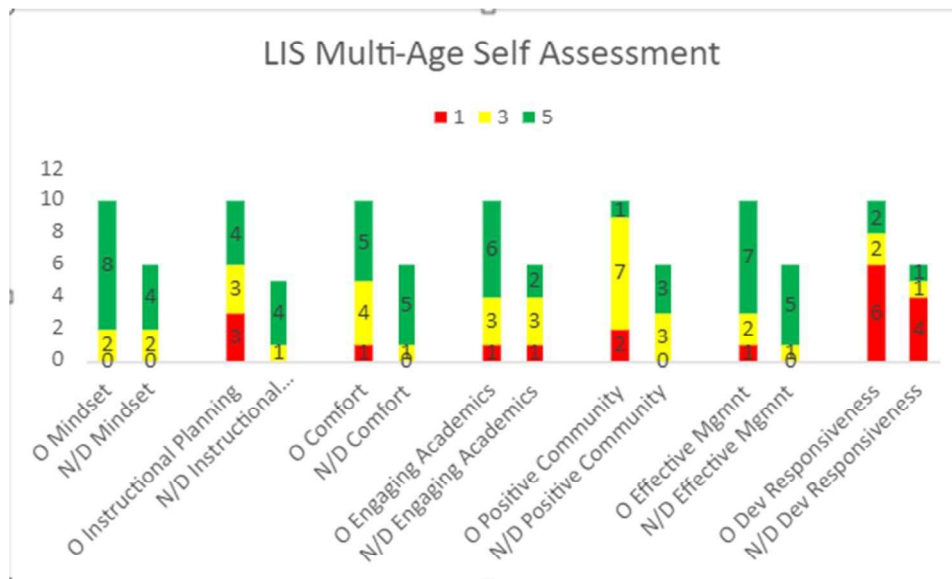


*LIS Student Engagement data will be sent at end of January

Teacher Self Assessment for Multi-Age Developmental Teaching and Learning in Classrooms



Goal 1 Board Dashboard



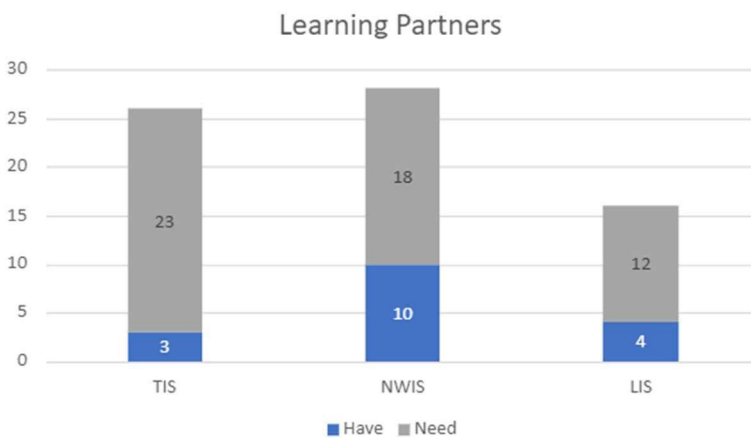
Total of 58 IG Visits in Oct and Nov

Cancellations:

Oct: TIS 2 due to lack of partner scheduled, 1 bus not ordered properly

Nov: TIS 4 due to snow day; NW 1 teacher ill, 1 COVID outbreak at partner; LIS 2 due to bussing mistakes, 1 COVID outbreak at partner

All homerooms are scheduled with partners through the end of the school year.



Goal is 2 Per Homeroom or 70

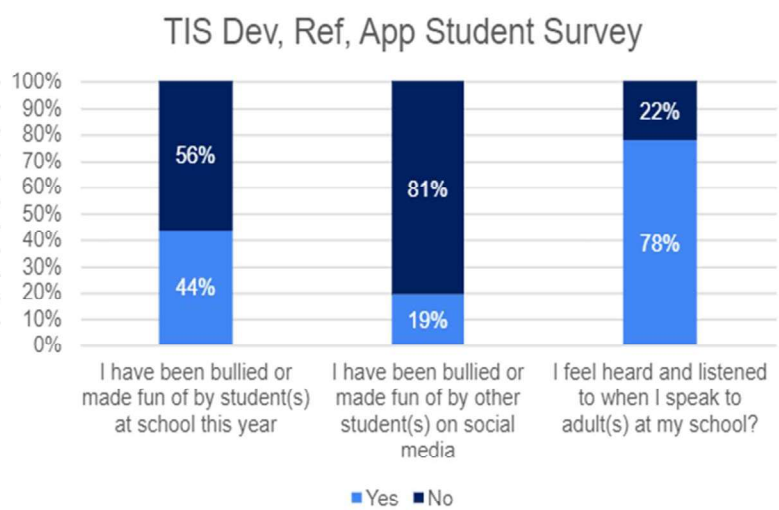
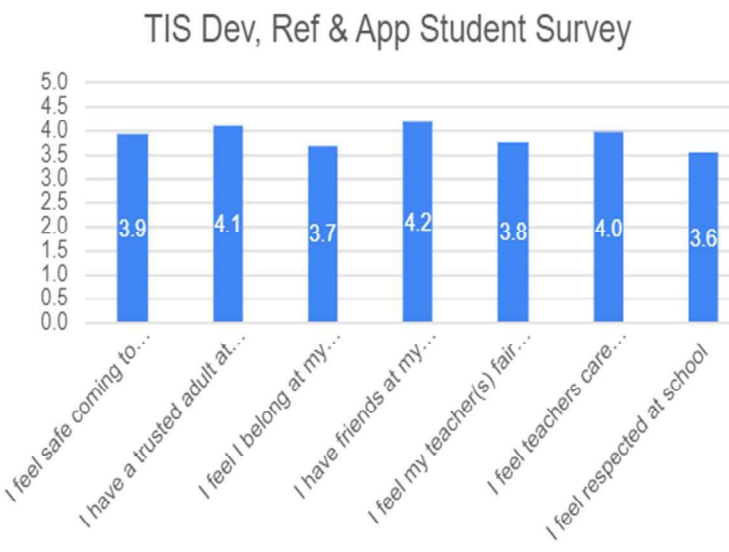
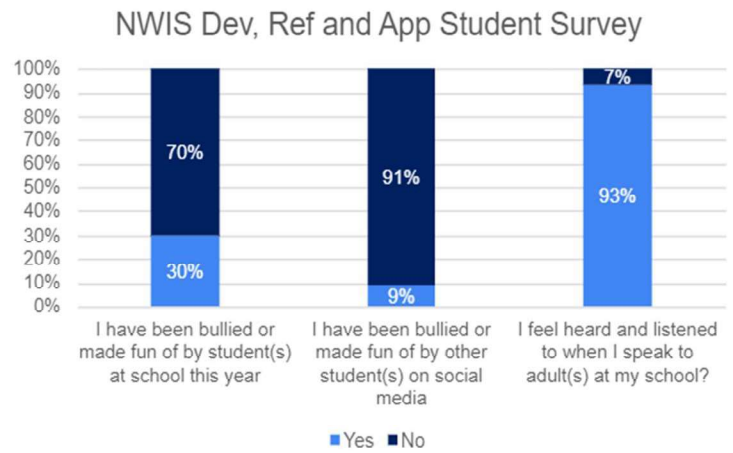
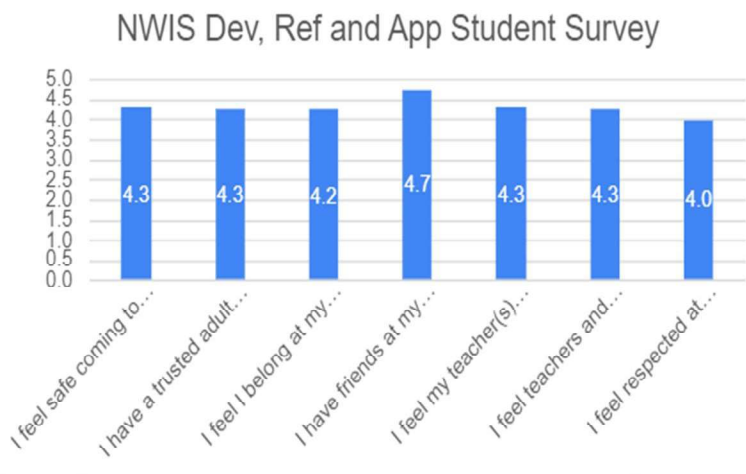
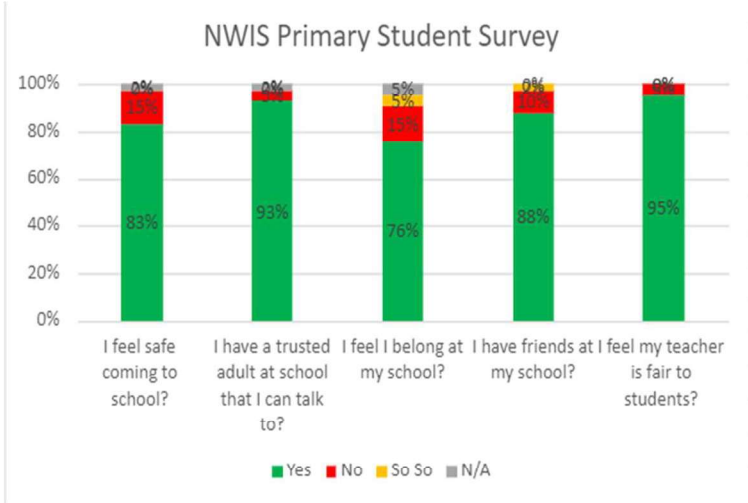
Have 17 active Learning Partners and 1 more for TIS in the pipeline

NWIS also had 2 St. Ignatius High School students each day

TIS also had 4 John Carroll Students until last week

33% of goal including all of these

Goal 1 Board Dashboard



Goal 1 Board Dashboard

	Creation of framework and training materials on Developmental Teaching in a Multi-Age Classroom Milestones (Jameson Lowery)	On Track or Not On Track
9/1	Multi-age survey to staff for Beg of Year self assessment	Done
9/30	Review survey results and determine area of need (Yardsticks book review on developmental stages)	Done
12/1	Offer a Professional Learning Community (PLC) session on developmental teaching	Done-but no sign ups
12/8	Multi-age survey to staff for End of Trimester 1	Done
12/8	Convene Lead Teachers for feedback on 1st Draft of training materials	Done
1/26	2nd Draft of training materials produced and shared w/Lead Teachers, Principals, and Coaches Complete 1 st round of mini-PD's at each school's staff meetings on developmental learning and individualized teaching	In progress
2/16	Multi-age survey to staff for End of Trimester 2	
3/22	Complete 2 nd set of mini-PD's at each school's staff meetings on developmental learning and individualized teaching	
3/30	Final framework and training materials created for new teachers	
5/30	Multi-age survey to staff for End of Year	

	Report Card/Mastery Project Milestones (Kristal Funk)	On Track or Not On Track
11/9	Share Plan and possible proficiency scales w/EAC	Done
11/29	Identify Priority Standards (ELA, Math) to include in reporting	Done
11/28	Proficiency scales shared w/coaches and principals for feedback	Done
12/1	Start communication w/Connect and Powerschool	On Track/ongoing
12/15	Deadline for feedback from teachers on proficiency scales and priority standards	In progress
12/18	Identify Behavior Standards (to take place of historic Values grades) and push out for feedback to all stakeholders	
12/22	Finalize draft of proficiency scale and priority standards	
January	Crosswalk priority standards to benchmarks w/coaches, identify gaps in assessments	
January	Start creating informational materials: <ul style="list-style-type: none"> • For parents about critical learning skills and mastery-based learning • For staff around standards referenced reporting and mastery-based teaching • For the school board to have general understanding of SBL and reporting 	
January	Invite families for input on proficiency scales and standards <ul style="list-style-type: none"> ▪ Provide a virtual and live process for both groups to provide feedback ▪ Deadline for feedback collection (xx) 	

Goal 2 Board Dashboard

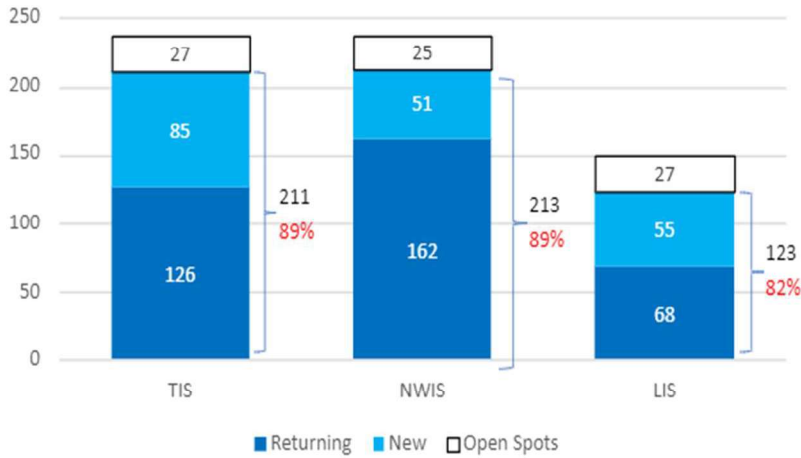
Goal 2 Indicators Key Milestones		On Track or Not On Track
Air Table Application and Review process launched by 8-30		Completed
IG Resource Web Site is Live by 9-15		Completed-but not accessible
Ohio Teacher Evaluation System (OTES) Goal Setting done by 10-31		In Progress late
Individual New Staff PD/licensing plans by 12-31		In Progress late

	Compensation Plan Revision Milestones (Aaron Davidson-Bey)	On Track or Not On Track
11/16	Determine data seeking and schools and distribute list to staff & volunteers to collect data	Done
1/12	All comparative school data is collected and charted	In progress
1/26	All stakeholder feedback is collected	
2/6	Draft of Comp Plan options with recommendations	
2/13	Finance Adv Council reviews projections of options to recommend	
2/21	Board Decision on Comp Plan for recruitment 23-24	

	Instructional Coaching	On Track or Not On Track
9/1	Instructional Coaches Assigned to all 67 teachers for Cycle 1 to establish relationships, help gather needed instructional materials, work on foundational knowledge of Resp CR	Done
10/3	Cycle 2 Specialized Assignments with Principals for 22 teachers across 3 schools from 10/16 through 11/17	Done
11/28	Coaches collect feedback from Principals and adjust	In Progress
12/1	Principal assignments for 12/1-12/22 (end of Cycle 2)	Done
	Over 239 instructional coaching hours provided and logged so far, mixed feedback from teachers and principals, will continue to adjust and respond to specific needs	
1/9	Cycle 3 assignments will be made by Principals with specific areas of focus for specific teachers	

Goal 3 Board Dashboard

Current Enrollment

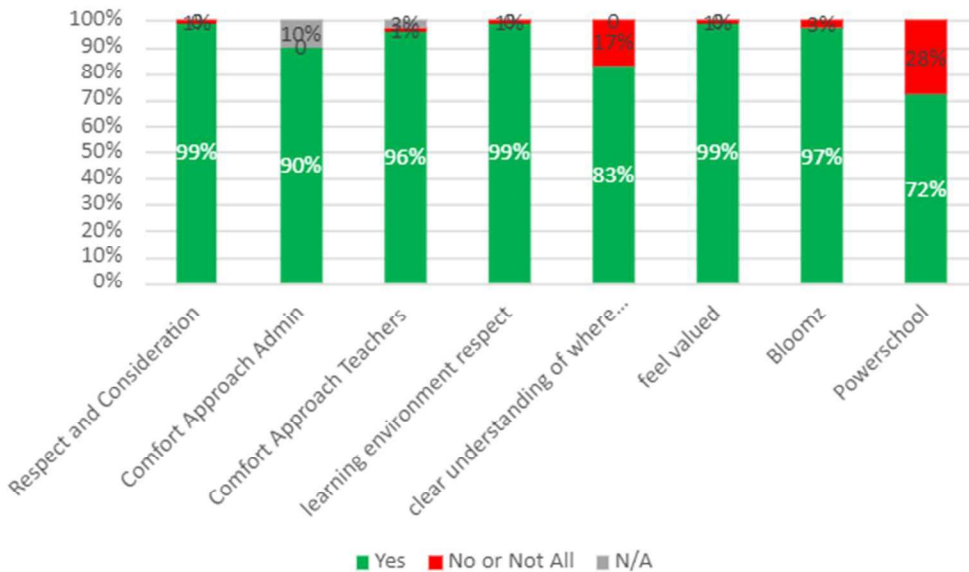


Retention This Year					22-23
	No Shows	WD's Oct	WD's to Date	In Year Retention	Oct to Oct
TIS	14	7	11	95%	73%
NWIS	6	4	7	97%	86%
LIS	11	7	12	91%	47%
Model	31	18	30	95%	

Indicators On Track or Not On Track	
	Complete/ On Track to Complete
1 st Model-wide Event for Fams by 10-31	Completed
Social Media Plan in place by 10-31, currently migrating all accounts to one	Plan in Place In Progress
SIP Rpts to Fams/Bd end of ea trimester	On Track
Parent Ed Sessions Scheduled 2x/Yr	

Model-Wide Newsletter							
Oct	Nov	Dec	Jan	Feb	Mar	Apr	May
X	--	X					

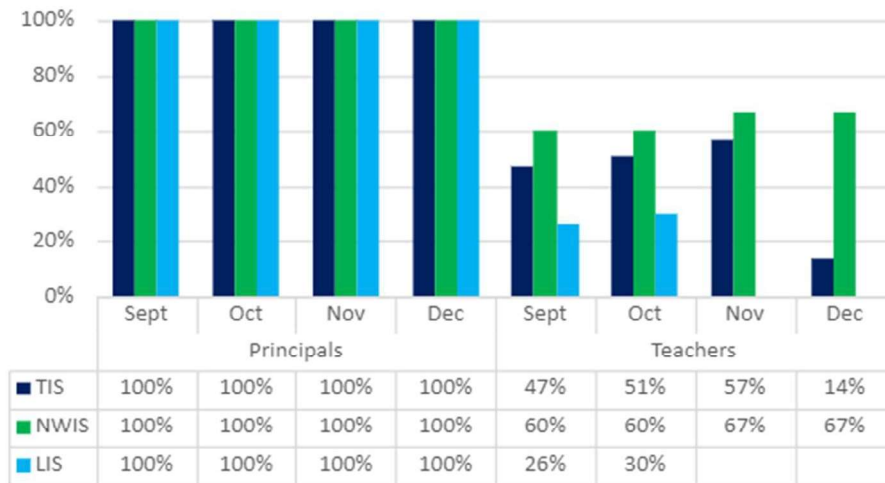
Family Surveys



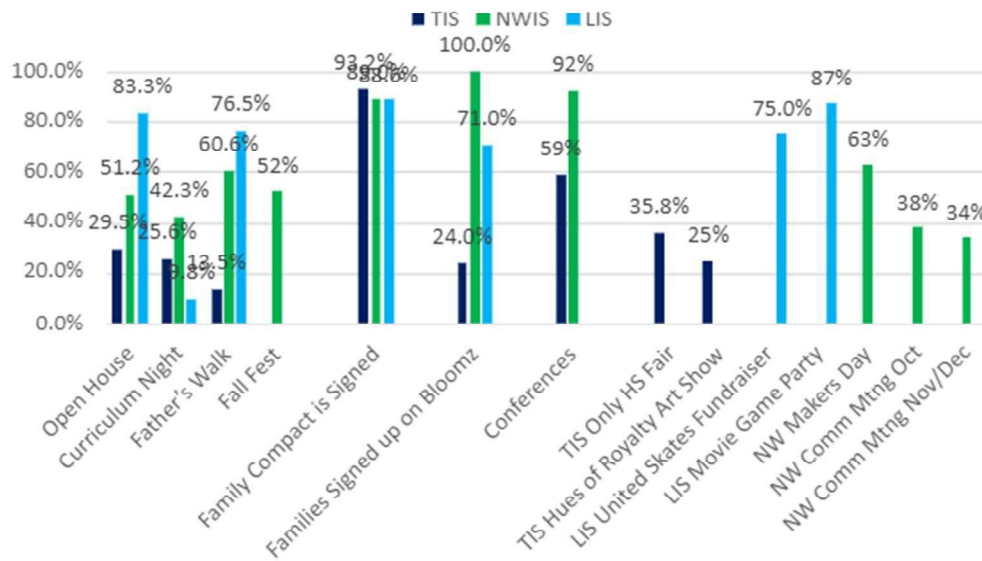
91 Respondents
 TIS 25
 NWIS 45
 LIS 21

Goal 3 Board Dashboard

Weekly Bloomz Communication with Families



Family Engagement



Goal 3 Board Dashboard

Some Highlights from Parent Surveys

What can improve your experience?

TIS

- Teaching kids not just how to learn but how to respect others and know when it's time play and time to study.
- Being a total wrap around, energetic, and creative.
- I like the open communication I receive regarding updates, my son's performance, or any alerts in regards to drills or mock lockdowns.

NWIS

- The school is pretty great at communication and understanding the children's needs.
- Creating community, knowing all the kids and their families, cultivating a kind and inclusive culture in the classroom, hosting family events.
- We love our NWIS community, it's clear the teachers care about the community and the principal knows all the students well!

LIS

- Communication has picked up alot Also I feel a safer experience with my kids at school than last year
- I believe the school is doing great versus the past couple of years, I see it's moving in a more positive direction
- This year it's been great, LIS staff had issues with staffing d administration, which has turned around...

What can we do better?

TIS

- New family communications
- More security and more staff outside after school.

NWIS

- Possibly more frequent updates on student's progress, other than just at parent teacher conferences.
- Better lunches
- Focus on academics especially for kids who are in the middle -- not in need of iep's but not working to their potential. Higher standards for academics specifically in language arts. Increased focus on racial diversity in leadership and teacher positions.

LIS

- Have a park for my kid to actually play instead of go outside for nothing. Also show the GPA so parents can have a better understanding on where work is needed
- Teachers putting more information on report cards.

Coversheet

Resolutions

Section: XI. Closing Items
Item: C. Resolutions
Purpose:
Submitted by:
Related Material: TIS-East- Resolution.pdf
Near West Resolutions.pdf
Lakeshore Docket-Resolution.pdf



December 13, 2023

BOARD RESOLUTIONS

At the Regular Meeting of the Board of Directors of The Intergenerational School on December 13, 2023 the following resolutions were proposed and approved by the board:

WHEREAS the mission of The Intergenerational School is to connect, create, and guide a multigenerational community of lifelong learners and spirited citizens as they strive for academic excellence;

WHEREAS as a Public Charter School in the State of Ohio, and in accordance with Board policy, the Board of Directors must review and approve all Minutes, Policies, Personnel Actions that were not named specifically in the prior approved budget, Contract Actions and Expenses over \$25,000, Out of State travel, and transactions between Intergenerational Schools;

IT IS THEREFORE RESOLVED that The Intergenerational School Board has reviewed and approves the following:

Consent Agenda

- 1. Minutes of the Special Board Meeting**
 - a. October 25, 2023
- 2. HB21 Verification of Residency Monthly Report**

Six student addresses were verified for November and December respectively. All families were validated using voter registration.

There are currently 0 flags due to the incorrect designation of the resident district in EMIS (Education Management Information System).

- 3. Personnel Actions:**

Stipends and Supplemental Pay Agreements

- a. **Duaa Almomani**, Building Substitute, a \$1000 signing bonus payable November 30, 2023, subject to completion of responsive classroom training. This is a budgeted expense to be paid from High Quality/Wellness funds or other monies obtained.

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216.721.0120

**Friends of the
Intergenerational Schools**
PO Box 200520
Cleveland, Ohio 44120
216.800.5181

- b. **Emma Monaghan**, additional supplemental compensation, effective November 1, 2023, for continuing to provide Assistant Principal services to The Intergenerational School – East on an as needed basis during the remainder of the 23-24 School Year and not to exceed \$2500 from November 1, 2023 through the end of 23-24 School Year. This position is not budgeted and to be paid from general funds or other monies obtained and NWIS will bill TIS for the services provided at an hourly rate of \$50.00 per hour.
- c. **Noree Wright** for participation in Professional Learning Community meeting, stipend of \$50.00 to be paid from general funds or other monies obtained.

Termination

- a. **Tomika Tate**, Assistant Principal, effective December 7, 2023.

4. Sponsor Fall Modifications

- a. The Fall modifications include changes to the Budget Bill, and the restructuring of the Ohio Department of Education now called the Ohio Department of Education and Workforce. The modifications also include statutory changes to the language of R.C. 3314.03 and states several laws community schools are required to follow as well as the Budget Bill restriction on a school's ability to employ an individual whose educator license has been revoked. Lastly, the Performance Accountability Framework has been updated to reflect changes in the report card data.

5. Annual Approval of Treasurer's Bond

- a. Douglas Mangen--\$25,000 Treasurer Bond expires 12/16/2026.

6. Approval of Designated Seizure Action Plan Employee

- a. Tanya Anglen, Wellness Coordinator, Daylan Johnson, Building Coordinator, and Patricia Wilson, School Counselor

7. Annual Renewal of Policies

- a. Special Education Policies and Procedures

8. Reading Improvement Plan

Finance Actions

IT IS THEREFORE RESOLVED that The Intergenerational School Board has reviewed and approves the following Financial Action Items:

- a. **October and November Financials**



Human Resources Actions

IT IS THEREFORE RESOLVED that The Intergenerational School Board has reviewed and approves the following Human resources Action Items:

- a. **Dr. Andrea Farenga**, Developing Teacher effective December 14, 2024, at annual salary of \$50,000 prorated to \$28,089.89 to reflect the reduced number of work days for the 23-24 sy. This is a budgeted expense to be paid out of General Funds or other monies obtained.

Education and Enrollment Actions

WHEREAS April 8, 2024, Cleveland, Ohio will experience a total solar eclipse which will take place during the regularly scheduled school day. The eclipse will start at approximately 2:00 pm with the peak total darkness occurring at 3:15 pm. School dismissal takes place between 3:00-3:00 pm.

WHEREAS Cleveland is predicting several thousand people will visit the city to witness this rare event. With the influx of visitors, emergency personnel have warned communities of overwhelmed first responders, overloaded cell phone towers, internet disturbances, severe traffic jams, and the potential for a gas shortage.

IT IS THEREFORE RESOLVED that The Intergenerational School Board has reviewed and approves the following Education and Enrollment Action Items:

- a. Amendment of the academic calendar to include April 8, 2024 as a day off of school, bringing the 23-24 instructional days to 164 (1066 instructional hours).

The Intergenerational School Board acknowledges the following was reviewed and discussed:

- a. Enrollment target of **238** for the 2024-2025 school year with re-enrollment and early enrollment beginning January 8, 2024, and ending March 8, 2024.

Governance Actions

WHEREAS as a Public Charter School in the State of Ohio, the Board of Directors must approve the election of all Board Members and Board Officers

WHEREAS the following Board members terms will be renewed through June 30, 2024

IT IS THEREFORE RESOLVED that The Intergenerational School Board hereby approves these changes.



- a. Mark Olson

IT IS THEREFORE RESOLVED that The Intergenerational School Board has reviewed and approves the following Governance Action Items:

- a. Advisory Council and IGClc/FIGS Board Charges

Lynn Carpenter, Board Chair





Intergenerational S C H O O L S

December 13, 2023

BOARD RESOLUTIONS

At the Regular Meeting of the Board of Directors of Near West Intergenerational School on December 13,, 2023, the following resolutions were proposed and approved by the board:

WHEREAS the mission of Near West Intergenerational School is to connect, create, and guide a multigenerational community of lifelong learners and spirited citizens as they strive for academic excellence;

WHEREAS as a Public Charter School in the State of Ohio, and in accordance with Board policy, the Board of Directors must review and approve all Minutes, Policies, Personnel Actions that were not named specifically in the prior approved budget, Contract Actions, and Expenses over \$25,000, Out of State travel, and transactions between Intergenerational Schools;

IT IS THEREFORE RESOLVED that the Near West Intergenerational School Board has reviewed and approves the following:

Consent Agenda

1. **Minutes of the Special Board Meeting**
 - a. October 25, 2023
2. **HB21 Verification of Residency Monthly Report**

Six student addresses were verified for November and December respectively. All families were validated using voter registration.

There are currently 0 flags due to the incorrect designation of the resident district in EMIS (Education Management Information System).

3. **Personnel Actions**
 - Stipends and Supplemental Pay Agreements**

- a. **Emma Monaghan**, supplemental compensation, effective November 1, 2023, for continuing to provide Assistant Principal services to Lakeshore Intergenerational School and The Intergenerational School – East on an as needed basis during the remainder of the 23-24 School Year and not to exceed \$2500 from November 1,

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2023 through the end of the 23-24 School Year. This position is not budgeted and to be paid from general funds or other monies obtained and NWIS will bill LIS and TIS for the services provided at an hourly rate of \$50.00 per hour.

- b. **Kori Morris**, supplemental compensation for work as RESA Mentor/Program Facilitator during the 23-24 School Year not to exceed \$1750. This position is budgeted and to be paid from general funds or other monies obtained.
- c. For participation in Professional Learning Communities, stipend of \$50.00 to be paid from general funds or other monies obtained. This is a budgeted expense.
 - i. **Zoe Welch**
 - ii. **John Anderson**

Staff Substitute Pay for First Trimester pursuant to Board approved policy

Name	Pay
Katie Bojko	\$298.33
Madison Brown	\$255.00
Caitlyn Hopkins	\$ 15.00
Beth McAllister	\$ 43.33
Megan Millard	\$ 90.00
Molly Mizisin	\$ 46.67
Kori Morris	\$ 28.33
Emmet O’Melia	\$160.00
Nancy Szilagyi	\$ 30.00
TOTAL	\$966.66

4. Annual Approval of Treasurer’s Bond

- a. Douglas Mangen--\$25,000 Treasurer Bond expires 12/16/2026.

5. Approval of Designated Seizure Action Plan Employee

- a. Dawn Madison Wellness Coordinator, Jacob Rinaldi, Building Coordinator, and Megan Young, School Counselor

IT IS THEREFORE RESOLVED that the Near West Intergenerational School Board has reviewed and approves the following Financial Action Items:

- b. October and November Financials**

Education and Enrollment Actions

WHEREAS April 8, 2024, Cleveland, Ohio will experience a total solar eclipse which will take place during the regularly scheduled school day. The eclipse will start at approximately 2:00 pm with the peak total darkness occurring at 3:15 pm. School dismissal takes place between 3:00-3:00 pm.



WHEREAS Cleveland is predicting several thousand people will visit the city to witness this rare event. With the influx of visitors, emergency personnel have warned communities of overwhelmed first responders, overloaded cell phone towers, internet disturbances, severe traffic jams, and the potential for a gas shortage.

IT IS THEREFORE RESOLVED that Near West Intergenerational School Board has reviewed and approves the following Education and Enrollment Action Items:

- a. Amendment of the academic calendar to include April 8, 2024 as a day off of school, bringing the 23-24 instructional days to 164 (1066 instructional hours).

The Near West Intergenerational School Board acknowledges the following was reviewed and discussed:

- a. Enrollment target of 238 for the 2024-2025 school year with re-enrollment and early enrollment beginning January 8, 2024 and ending March 8, 2024

Governance Action

WHEREAS as a Public Charter School in the State of Ohio, the Board of Directors must approve the election of all Board Members and Board Officers

WHEREAS the following Board members terms will be renewed through June 30, 2024

IT IS THEREFORE RESOLVED that Near West Intergenerational School Board hereby approves these changes.

- a. Mark Olson
- b. Mark Charvat
- c. Robert Nicolay, Near West Representative on the IGClc Board

IT IS THEREFORE RESOLVED that Near West Intergenerational School Board has reviewed and approves the following Governance Action Items:

1. Advisory Council and IGClc/FIGS Board Charges

Lynn Carpenter, Board Chair





Intergenerational S C H O O L S

December 13, 2023

BOARD RESOLUTIONS

At the Regular Meeting of the Board of Directors of Lakeshore Intergenerational School on December 13, 2023, the following resolutions were proposed and approved by the board:

WHEREAS the mission of Lakeshore Intergenerational School is to connect, create, and guide a multigenerational community of lifelong learners and spirited citizens as they strive for academic excellence;

WHEREAS as a Public Charter School in the State of Ohio, and in accordance with Board policy, the Board of Directors must review and approve all Minutes, Policies, Personnel Actions that were not named specifically in the prior approved budget, Contract Actions, and Expenses over \$25,000, Out of State travel, and transactions between Intergenerational Schools;

IT IS THEREFORE RESOLVED that Lakeshore Intergenerational School Board has reviewed and approves the following:

Consent Agenda

1. Minutes of the Special Board Meeting

- a. October 25, 2023

2. HB21 Verification of Residency Monthly Report

Six student addresses were verified for November and December respectively. All families were validated using voter registration.

There are currently 0 flags due to the incorrect designation of the resident district in EMIS (Education Management Information System).

3. Contract Actions

- a. **Haley Bizub**—Work with students for literacy support as assigned by the Principal or instructional coach from December 11, 2023-December 20, 2023 at a rate of \$25 per hour, not to exceed \$1,500. This is not a budgeted expense to be paid out of general funds or other monies obtained.

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4. Personnel Actions

New Staff Letter of Hire

- a. **Angela McIntyre**, Classroom Aide, effective November 28, 2023, at an annual salary of \$30,000 prorated to \$18,876.40 to reflect the reduced number of work days for the 23-24 SY. This is a budgeted expense, payable from General Funds or other monies obtained.
- b. **Jade Woodson**, Assistant Principal, effective January 8, 2023, at an annual salary of \$66,000 prorated to \$34,753.62 to reflect the reduced number of work days for the 23-24 SY. This is a budgeted expense, payable from General Funds or other monies obtained.

Revised Agreements

- a. **Beverly Poole**, HR Teacher - Primary, a revised signing bonus letter increasing payment from \$837.08 to \$1000 payable November 30, 2023, subject to completion of Responsive Classroom training. This is a budgeted expense, to be paid from High Quality/Wellness funds or other monies obtained.

Stipends and Supplemental Pay Agreements

- a. **Emma Monaghan**, additional supplemental compensation, effective November 1, 2023, for continuing to provide Assistant Principal services to Lakeshore Intergenerational School on an as needed basis during the remainder of the 23-24 School Year and not to exceed \$2500 from November 1, 2023 through the end of the 23-24 School Year. This position is not budgeted and to be paid from general funds or other monies obtained and NWIS will bill LIS for the services provided at an hourly rate of \$50.00 per hour.

Staff Substitute Payout for First Trimester pursuant to Board approved policy:

Name	Pay
Jesse Ditto	\$ 40.00

Resignations and Termination

- a. **Julia Mitchell**, Primary Teacher, effective November 17, 2023
- b. **Tyeisha Brown**, Wellness Coordinator, effective November 29, 2023
- c. **Isabella Restori**, Developing Teacher, effective December 1, 2023
- a. **Kalyi Cheeks**, Primary Teacher, effective December 1, 2023

Annual Approval of Treasurer's Bond

- a. Douglas Mangen--\$25,000 Treasurer Bond expires 12/16/2026.



Approval of Designated Seizure Action Plan Employee

- b. Tanya Anglen, Wellness Coordinator, Daylan Johnson, Building Coordinator, and Patricia Wilson, School Counselor

Finance Actions

IT IS THEREFORE RESOLVED that Lakeshore Intergenerational School Board has reviewed and approves the following Financial Action Items:

- a. **October and November Financial Reports**

Education and Enrollment Actions

WHEREAS April 8, 2024, Cleveland, Ohio will experience a total solar eclipse which will take place during the regularly scheduled school day. The eclipse will start at approximately 2:00 pm with the peak total darkness occurring at 3:15 pm. School dismissal takes place between 3:00-3:00 pm.

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The Lakeshore Intergenerational School Board acknowledges the following was reviewed and discussed:

- a. Enrollment target of _____ for the 2024-2025 school year with re-enrollment and early enrollment beginning January 8, 2024 and ending _____.

Governance Action

WHEREAS as a Public Charter School in the State of Ohio, the Board of Directors must approve the election of all Board Members and Board Officers



WHEREAS the following Board members terms will be renewed through June 30, 2021

- a. Mark Olson

IT IS THEREFORE RESOLVED that Lakeshore Intergenerational School Board hereby approves these changes.

IT IS THEREFORE RESOLVED that Lakeshore Intergenerational School Board has reviewed and approves the following Governance Action Items:

- a. Advisory Council Charges and IGCIe/FIGS Board Charge

Lynn Carpenter, Board Chair

