



THE
Intergenerational
S C H O O L S

Intergenerational Schools

October School Board Meeting

Published on October 18, 2024 at 4:18 PM EDT

Amended on October 21, 2024 at 6:24 PM EDT

Date and Time

Wednesday October 23, 2024 at 6:00 PM EDT

Location

Near West Intergenerational School
3805 Terrett Ave.
Cleveland, Ohio 44113

The Intergenerational School creates, connects, and guides a multigenerational community of lifelong learners and spirited citizens that strive for academic excellence.

Agenda

	Purpose	Presenter	Time
I. Board Resolutions			6:00 PM
A. Board Resolutions for Schools			
II. Opening Items			6:00 PM
A. Record Attendance			
B. Call the Meeting to Order			
C. Mission Moment			3 m

	Purpose	Presenter	Time
D. Elevator Speech & Social Media Posts			2 m
III. Fundraising Report/Dashboard			6:05 PM
A. Appeal Results Cost/Revenue	FYI		5 m
B. End of Year Annual Appeal Plan	Discuss		5 m
IV. Finance			6:15 PM
A. Approval of August and September Financials	Vote	Celeste Farmer	5 m
B. Approval of the Five-Year Forecast for Submission to the Ohio Department of Education and Workforce	Vote	Brooke King	
C. Approval of the Annual Budget for Submission to Ohio Department of Education & Workforce			
D. Long Term Projections Gap Analysis	Discuss		15 m
V. Consent Agenda			6:35 PM
A. Consent Agenda-Approval of August 28, 2024 Minutes Please read Board Resolutions	Vote		5 m
B. Contracts and MOUs	Vote		
TIS-East			
<ul style="list-style-type: none"> • NEW-Clarity Couch- To provide one one-on-one therapy at TIS-East for teachers and staff. The cost of this service will not exceed \$5,000 and will be paid through general funds or other monies. This is a budgeted expense. • NEW-Earl Ingram- To provide independent contractor services to manage and implement a Recess and Lunch Monitor program during the 2024- 2025 School Year, effective September 16, 2024, at a rate of \$20.27 per hour, not to exceed \$6,000. This is a budgeted expense payable from General Funds or other monies obtained. • NEW-Ohio Connections- To ratify the contract that began on September 3, 2024 to provide bussing services to transport Lakeshore students to and from TIS-East daily. The cost is \$300 daily from September 3, 2024 to November 8, 			

	Purpose	Presenter	Time
	<p>2024 and is not to exceed \$12,900. This is a budgeted expense and should be paid out of general funds or other monies obtained,</p> <ul style="list-style-type: none"> • NEW-Ohio Connections--To approve the continuation of Ohio Connections contract for Trimester 2 & 3 to transport approximately 30 Lakeshore students on time, reliably with a reasonable pick-up and drop-off time each day. This expense totals \$33,900, of which \$7,100 is budgeted and \$26,900 is unbudgeted. This should be paid out of general funds or other monies obtained. 		
<p>1. Revised-D&N Transportation—Revision to the original contract for transporting general education students to and from TIS who did not qualify for CMSD transportation services (lived outside of Cleveland). the current contract would include monitoring students before bus pickup in the morning and parent pickup in the afternoon, for \$80 per day for \$155 days, totaling \$12,000. In addition, TIS would pay \$2,000 for the first ten days of school under the original contractual agreement, for both monitoring and transport of students (\$200 per day for 10 days). The entire contract (less the special education portion which still stands) is now totaling \$14,000. This is a budgeted expense to be paid out of general funds.</p>			
	<ul style="list-style-type: none"> • NEW-FIT Technologies--To move 10 Chromebook carts, 100 Chromebooks, and 3 Mimio Boxlite Interactive from Lakeshore to TIS-East. FIT will connect the boards once transport is complete. The total cost of the project will not exceed \$2,538 and to be paid out of general funds. 		

Near West

- **NEW-Diversity Center of Northeast Ohio**--DCNEO will work with Near West staff on exploring unconscious bias and how professionals can minimize its effects on colleague and student relations. This is a budgeted expense that will be paid out of general funds and not to exceed \$2200.

TIS-East and Near West

- **NEW-BrandPivot**--To provide various branded materials such as Handbooks, Office templates, Annual Reports, Strategic Plan design and summary, T-shirt designs to both schools. The cost of these services is budgeted and to be paid out of general funds or other monies obtained and not to exceed \$5000.
- **Additional Work-KF Consulting**--To provide bi-weekly standing check-ins and to research, communication and navigation of compliance and leadership at an hourly rate of \$55 per hour for a total of 70 hours. This is a budgeted expense not to exceed \$3850 to paid out of general funds and split between the two schools (\$1925 per school).

	Purpose	Presenter	Time
C. New & Annual Policy Renewal	Vote		
Annual Renewal			
<ul style="list-style-type: none"> • Enrollment & Attendance Policy • Academic Prevention and Intervention Services • Special Education Policies and Procedures 			
New			
<ul style="list-style-type: none"> • Political Views & Religious Freedom 			
D. Personnel Actions	Vote		
listed in each school's Board Resolution			
E. Ratification of TIS-East Board Members			
Ratify the election of the following new members to TIS board who were nominated pending the approval of ESCLEW:			
<ul style="list-style-type: none"> • Carolyn Wald--Term ending June 30, 2027 • Brad Norton--Term ending June 30, 2027 • Robert Nicolay--Term ending June 30, 2027 			
F. Approval of Annual Report			
G. Change Board Meeting Dates			
Change the April 23, 2025 meeting date to April 2, 2025			
Add May 14, 2025			
VI. Executive Committee			6:40 PM
A. Introduction to the Merger Opportunity between TIS-East & Near West	FYI		10 m
VII. Public Comment			6:50 PM
A. Public Comment	FYI		5 m
Any person or group wishing to place an item on the agenda shall register their intent with the Executive			

	Purpose	Presenter	Time
Director/CEO (or designee-Chief Operating Officer) no later than five (5) days prior to the meeting and include: A. name and address of the participant; B. group affiliation, if and when appropriate; C. topic to be addressed			
VIII. Sponsor Reports			6:55 PM
A. ESCLEW Sponsor Report			5 m
IX. Governance Advisory Council			7:00 PM
A. Advisory Council Priorities including FIGS	Discuss		5 m
X. Education Advisory Council			7:05 PM
A. Sponsor Education	FYI		5 m
B. State Test Comparisons			5 m
C. Fall NWEA Scores			10 m
D. Enrollment Dashboard			
XI. Executive Sessions			7:25 PM
To consider the appointment, employment, dismissal, discipline, promotion, demotion, or compensation of a public employee or official, or the investigation of charges or complaints against a public employee, official, licensee, or regulated individual, unless the employee, official, licensee, or regulated individual requests a public hearing.			
A. Executive Session			25 m
XII. Closing Items			7:50 PM
A. Adjourn Meeting	Vote		

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Coversheet

Board Resolutions for Schools

Section: I. Board Resolutions
Item: A. Board Resolutions for Schools
Purpose:
Submitted by:
Related Material: TIS Resolutions October 2024.pdf
NWIS Resolutions 2024.pdf



Intergenerational S C H O O L S

October 23, 2023

BOARD RESOLUTIONS

At the Regular Meeting of the Board of Directors of The Intergenerational School on October 23, 2024 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 Board Meeting

- a. Regular Board Meeting, August 28, 2024

2. Contracts and MOUs

- a. **BrandPivot**—To provide various branded materials such as Handbooks, Office templates, Annual Reports, Strategic Plan design and summary, T-shirt designs to both schools. The cost of these services is budgeted and to be paid out of general funds or other monies obtained and not to exceed \$5000 to be split between the two schools. .
- b. **K. Funk Consultants LLC**—to provide bi-weekly standing check-ins and to research, communication and navigation of compliance and leadership at an hourly rate of \$55 per hour for a total of 70 hours. This is a budgeted expense not to exceed \$3850 to paid out of general funds and split between the two schools (\$1925 per school)

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- c. **Clarity Couch**--To provide one one-on-one therapy at TIS-East for teachers and staff. The cost of this service will not exceed \$5,000 and will be paid through general funds or other monies. This is a budgeted expense.
 - d. **Earl Ingram**, to provide independent contractor services to manage and implement a Recess and Lunch Monitor program during the 2024- 2025 School Year, effective September 16, 2024, at a rate of \$20.27 per hour, not to exceed \$6,000. This is a budgeted expense payable from General Funds or other monies obtained.
 - e. **Ohio Connections**- To ratify the contract that began on September 3, 2024 to provide bussing services to transport Lakeshore students to and from TIS-East daily. The cost is \$300 daily from September 3, 2024 to November 8, 2024 and is not to exceed \$12,900. This is a budgeted expense and should be paid out of general funds or other monies obtained.
 - f. **Ohio Connections**--To approve the continuation of Ohio Connections contract for Trimester 2 & 3 to transport approximately 30 Lakeshore students on time, reliably with a reasonable pick-up and drop-off time each day. This expense totals \$33,900, of which \$7,100 is budgeted and \$26,900 is unbudgeted. This should be paid out of general funds or other monies obtained.
 - g. **Revised-D&N Transportation**—Revision to the original contract for transporting general education students to and from TIS who did not qualify for CMSD transportation services (lived outside of Cleveland). the current contract would include monitoring students before bus pickup in the morning and parent pickup in the afternoon, for \$80 per day for \$155 days, totaling \$12,400. In addition, TIS would pay \$2,000 for the first ten days of school under the original contractual agreement, for both monitoring and transport of students (\$200 per day for 10 days). The entire contract (less the special education portion which still stands) is now totaling \$14,000. This is a budgeted expense to be paid out of general funds.
 - h. **FIT Technologies**--To move 10 Chromebook carts, 100 Chromebooks, and 3 Mimio Boxlite Interactive from Lakeshore to TIS-East. FIT will connect the boards once transport is complete. The total cost of the project will not exceed \$2,538 and is to be paid out of general funds.
3. **New and Annual Renewal of Policies**
- a. **Renewal:** Enrollment & Attendance Policy
 - b. **Renewal:** Academic Prevention & Intervention Services
 - c. **Renewal:** Special Education Policies & Procedures
 - d. **New:** Political Views & Religious Freedom
4. **Personnel Actions:**



Letters of Hire

- a. **Amonte Littlejohn**, Full-time Paraprofessional for the 2024-2025 School Year, at a rate of \$20.00 per hour, effective October 21, 2024 through the end of the school year. This is a budgeted expense not to exceed \$21,440, payable from General Funds or other monies obtained.
- b. **Grant Jamison**, Intervention Specialist, effective October 21, 2024, at an annual salary of \$45,000, prorated to \$33,315 to reflect the reduced number of work days for the 24-25 School Year. This is a budgeted expense, payable from General Funds or other monies obtained.

Resignations

William Green, bus monitor, resignation effective August 22, 2024.

Dennise Collins, HR Teacher – Refining Math/Science, resignation effective September 5, 2024.

5. **Governance:**

Ratify the election of the following new members to The Intergenerational School board who were nominated pending the approval of ESCLEW:

- a. Carolyn Wald-term ending June 30, 2027
- b. Brad Norton-term ending June 30, 2027
- c. Robert Nicolay-term ending June 30, 2027

6. **Approval of the Annual Report**

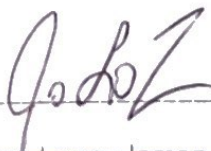
7. **Change Board Meeting Dates**

- a. Change the April 23, 2025 meeting to April 2, 2025
- b. Add May 14, 2025

Finance Actions

IT IS THEREFORE RESOLVED that The Intergenerational School Board has reviewed and approves the following Financial Action Items:

- a. **August & September Financials**
- b. **Approval of the Five-Year Forecast for Submission to the Ohio Department of Education and Workforce**
- c. **Approval of Annual Budget for Submission to the Ohio Department of Education and Workforce**



Joann Lopez-Ioman, Secretary





Intergenerational S C H O O L S

October 23, 2024

BOARD RESOLUTIONS

At the Regular Meeting of the Board of Directors of Near West Intergenerational School on October 23, 2024, 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 Board Meeting

- a. Regular Board Meeting, August 28, 2024

2. Contracts and MOUs

- a. **BrandPivot**—To provide various branded materials such as Handbooks, Office templates, Annual Reports, Strategic Plan design and summary, T-shirt designs to both schools. The cost of these services is budgeted and to be paid out of general funds or other monies obtained and not to exceed \$5000 to be split between the two schools.
- b. **K. Funk Consultants LLC**—to provide bi-weekly standing check-ins and to research, communication and navigation of compliance and leadership at an hourly rate of \$55 per hour for a total of 70 hours. This is a budgeted expense not to exceed \$3850 to be paid out of general funds and split between the two schools (\$1925 per school).

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October 23, 2024

BOARD RESOLUTIONS

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- c. **Diversity Center of Northeast Ohio**—DCNEO will work with Near West staff on exploring unconscious bias and how professionals can minimize its effects on colleague and student relations. This is a budgeted expense that will be paid out of general funds and not to exceed \$2200.

3. New and Annual Renewal of Policies

- a. **Renewal:** Enrollment & Attendance Policy
- b. **Renewal:** Academic Prevention & Intervention Services
- c. **Renewal:** Special Education Policies & Procedures
- d. **New:** Political Views & Religious Freedom

4. Personnel Actions

Stipends

Dyslexia/Science of Reading (\$1,368) and Bookworms K-5 (\$500) training Stipend for 2024-2025 School Year not to exceed \$1,868 for the individual listed below. This is a budgeted expense, \$1,368 of which is reimbursed by the Ohio Department of Education and Workforce and payable from General Funds or other monies obtained.

- a. **Rosa Madison**

Science of Reading (Pathway E) Training Stipend for the 2024-2025 School Year not to exceed \$456 for the individual listed below. This is a budgeted expense reimbursed by the Ohio Department of Education and Workforce and payable from General Funds or other monies obtained.

- b. **McKenna Brown**

5. Approval of the Annual Report

6. Change Board Meeting Dates

- a. Change the April 23, 2025 meeting to April 2, 2025
- b. Add May 14, 2025

Finance Actions

IT IS THEREFORE RESOLVED that the Near West Intergenerational School Board has reviewed and approves the following Financial Action Items:

- a. **August and September Financials**
- b. **Approval of the Five-Year Forecast for Submission to the Ohio Department of Education and Workforce**
- c. **Approval of the Annual Budget for Submission to Ohio Department of Education & Workforce**



Joanna Lopez-Inman, Secretary



Coversheet

Appeal Results

Section: III. Fundraising Report/Dashboard
Item: A. Appeal Results
Purpose: FYI
Submitted by:
Related Material: IGS Development & Marketing Dashboard 10182024.pdf



Development & Marketing Dashboard *As of October 17, 2024*

Objective

- Create and grow IGS fundraising and marketing strategic plan and programs, coordinating and supporting the execution of activities and tactics with the IGS Executive Director, the IGS Staff and the Friends of Intergenerational Schools (FIGS) board.

Key Recent Activities – September & October

Development

- Governance documents finalized!
- Spring/Summer appeal rescheduling and redrafting, sent in the fall after many messaging edits and postponements
- Major gift prospect listings updated into Bloomerang and reports created
- Major gift list engagement in focused meetings and next steps approved
- Annual Report schedule and management, with Inbloom writing a significant portion of the copy
- Ongoing grant prospecting and engagement
- End of Year Appeal schedule and approval by IGS leadership

Marketing

- Printed Materials Drafted – Donor Brochure, FIGS One Pager, IGSchools
- Continue bi-weekly Social Posts on Facebook and LinkedIn
- Create monthly advertisement or boosted post strategy
- Email analysis and recommendations from summer appeal
- Monthly Social Media analytics tracking and analysis

Key Future Activities – November & December

Development

- Grant applications and research, process confirmation, reporting considerations
- Focus on top/major prospect list with Brooke: cultivation visits/call and tours
- Activation of new KPIs/goals dashboard for reporting moving forward
- End of Year Appeal – Nov 12-Dec 23
- Board engagement work into marketing and development

Marketing

- End of Year Appeal marketing – Nov 12-Dec 23
- Training on Forms and Google

Major Gift & Grant Highlights

Grants:

- Previous FY23-24 Grants: \$453,398.90 (12)
- Current FY25 Grants: \$0 (0)

Upcoming Grant Engagement:

- Howley Foundation
- Codrington Foundation
- PNC Charitable Trusts
- Cleveland Cliffs Foundation
- Lubrizol Foundation
- Synthomer Foundation

Pending Solicitations

- None at this time

Recent/Upcoming Engagement

- Erin Figer
- Bonne Bell Foundation
- Peter Whitehouse
- Mark Elliot
- Catharine Whitehouse
- Barbara Wolfort
- John Guinness
- Molly Wimbiscus
- Steven Knoch
- Karol Goodman
- Christopher McDonnell
- Reuben Bonerath

FIGS Board Engagement & Goal Tracking

Individual Goals (carried over from last year - new will be determined during November 2024 FIGS board retreat)

- 100% Board Giving by 6/30/24
- Fill 6 School Tours or meetings by end of 23-24 School Year
- Share/Like/Comment on 1 IGS LinkedIn or FB Post each week

Collective Goals (carried over from last year)

- Define board growth plan, governance process and documents
- Plan and host 3 pipeline building events
- Support key gift and donations

Upcoming Tours & Meetings

- Tours:
- Meetings: Executive Committee 10/17 8am, FIGS 10/23 5pm NWIS
- See FY2025 full calendar!



Development Insights – *As of September 2024*

FISCAL YEAR - July 1 - June 30												
	FY 2019-2020		FY 2020-2021		FY 2021-2022		FY 2022-2023		FY 2023-2024		FY 2024-2025	
	# Gifts	\$ Raised	# Gifts	\$ Raised	# Gifts	\$ Raised	# Gifts	\$ Raised	# Gifts	\$ Raised	# Gifts	\$ Raised
\$100,000+	1	\$200,000.00	2	\$339,043.00	1	\$200,000.00	2	\$307,951.00	2	\$310,000.00		
\$50,000-\$99,999	1	\$53,534.00			1	\$64,470.00	1	\$50,000.00	2	\$113,313.90		
\$25,000-\$49,999	1	\$32,000.00	4	\$155,245.00	1	\$40,000.00			0	\$0		
\$10,000-\$24,999	2	\$20,000.00	5	\$64,000.00	2	\$39,600.00	1	\$10,000.00	0	\$0		
\$5,000-\$9,999	4	\$20,000.00	2	\$12,500.00	2	\$12,500.00	4	\$21,000.00	3	\$21,585.00		
\$2,500-\$4,999	4	\$10,025.00	2	\$6,950.00			1	\$2,503.00	2	\$7,000.00		
\$1,000-\$2,499	6	\$10,298.97	7	\$10,525.00	8	\$11,735.55	17	\$17,494.80	2	\$2,000.00		
\$500-\$999	6	\$3,345.18	5	\$2,750.00	2	\$1,025.38	7	\$4,714.19	4	\$2,300.00	1	\$500.00
\$250-\$499	6	\$1,507.65	6	\$1,742.69	7	\$1,900.00	38	\$11,292.10	9	\$2,500.75	2	\$608.05
\$100-\$249	52	\$7,578.50	49	\$6,578.36	56	\$7,077.57	47	\$6,521.56	19	\$2,514.09	10	\$1,136.10
<\$100	212	\$8,339.60	124	\$4,059.46	128	\$3,279.57	111	\$3,735.15	19	\$551.68	1	\$50.00
Total Raised	295	\$365,629.93	206	\$603,343.51	208	\$381,588.07	229	\$435,211.80	60	\$458,765.42	14	\$2294.15
Highest Gift		\$200,000.00		\$200,000.00		\$200,000.00		\$200,000.00		\$200,000.00		\$500.00
Lowest Gift		10		10		\$10.00		10		5		\$50.00
Average Gift		\$1,239.42		\$2,928.85		\$1,834.56		\$1,900.49		\$7,646.09		\$163.87

Notes on the Numbers:

- FY2021 includes one-time government grants.
- FY2023 includes the Gala where the \$1,000-\$2,499 and \$250-\$499 category increases came from.
- FYTD2024 numbers do not include the end of the school year appeal that will be sent in May/June or pledges.
- Other smaller gifts in previous years came through peer-to-peer fundraising asks which is something we can explore if/when we have others that want to participate in that kind of activity.
- Non-competitive government grants are not included, and competitive grants are included if they are entered into Bloomerang.

Note(s) on the Goal:

- The FY2024 fundraising goal is \$550,000, as determined by a budget set by the School Board and not on fundraising data/history.



Marketing Analytics – *As of September 2024*

2024 IGS Marketing KPI's Social Media									
	Jan-24	Feb-24	Mar-24	Apr-24	May-24	Jun-24	Jul-24	Aug-24	Sep-24
LinkedIn Followers	422	440	448	458	461	466	469	475	481
LinkedIn Impressions	423	2063	1308	1,455	945	705	851	1,212	1,479
LinkedIn Paid Impressions	0	0	0	0	0	0	0	19,548	18,366
LinkedIn Engagement	15	144	75	59	55	8	2	49	70
Facebook Followers	309	312	314	341	323	349	360	371	375
Facebook Reach	298	507	1,440	1,748	1,934	2,881	1,295	1,455	1,710
Facebook Engagement	104	282	265	292	308	109	110	226	102
Instagram Followers	585	607	612	644	648	660	673	695	730
Instagram Reach	239	329	1,294	939	1,923	2,401	2,557	1,880	4,235
Instagram Engagement	49	168	226	260	557	128	288	509	361
Total Social Reach	960	2,899	4,042	4,142	4,802	3,687	4,703	4,547	7,424
Total Social Engagement	168	594	566	611	920	245	400	784	533
Total Social Following	1,316	1,359	1,374	1,443	1,432	1,475	1,502	1,541	1,586
Total Social FIGS Involvement	22%	33%	18%	22%	33%	0%	0%	10%	20%



Marketing Analytics Analysis – *As of September 2024*

- **LinkedIn Impressions:**
 - There are noticeable fluctuations in LinkedIn impressions month over month, with significant peaks and valleys. These variations are directly tied to boosted posts, which have shown a 10X increase in impressions for every \$20 spent.
 - To maintain this expanded reach and visibility, it's recommended to continue allocating a monthly budget for boosting posts. This consistent investment will help sustain higher engagement and ensure that content reaches a broader audience, particularly during key periods.
- **Followers:**
 - The number of followers has shown steady growth from January 2024 (422) to September 2024 (481). This indicates consistent organic growth from consistent content.
 - Engage with your followers by commenting, liking and sharing their comments and posts.
 - Ask followers to write on your wall - what Facebook calls leave a review - you will find these under the review tab on Facebook
 - With all events ask followers to check in to IGS on Facebook or Instagram
 - Frequently tag your location in your posts.
 - Organize your Instagram Stories highlights
 - Include a call to action, “like and follow”
 - As the audience expands, consider asking followers directly what type of content they would like to see more of (e.g., thought leadership, industry insights, or behind-the-scenes content).
- **Website**
 - Update results and awards page - Include images
 - Download form email signups weekly - ensure proper engagement is taking place.

Confidential

Coversheet

Approval of August and September Financials

Section: IV. Finance
Item: A. Approval of August and September Financials
Purpose: Vote
Submitted by:
Related Material: IG Network - Sep'24 Financial Summary.pdf
TIS - Sep'24 Financial Report.pdf
IGC - Sep'24 Financial Report.pdf
NWIS - Sep'24 Financial Report.pdf



Financial Report – September 2024

Key Financials (in \$000s)	Schools Total	TIS	NWIS	IGC
YTD Core Program Net Income	+\$282	+\$119	+\$163	(\$101)
FY25 Core Program Projected Net Income	(\$1,492)	(\$642)	(\$850)	(\$125)
FY25 Core Program Projected Budget Variance	(\$263)	(\$164)	(\$99)	(\$3)
Month-End Cash Balance	+8,986	+\$4,239	+\$4,747	+1,105
Unrestricted Net Assets	+\$9,082	+\$4,300	+\$4,782	+\$1,188

Fiscal Health Benchmarks		Standard	TIS	NWIS	IGC
Liquidity Ratio Index*	$\frac{\text{Current Assets}}{\text{Current Liabilities}}$	1.0 to 1.1	8.89	15.44	8.16
Operating Cash Ratio*	$\frac{\text{Total Cash}}{\text{Avg. Monthly Exp.}}$	1.0 to 2.0 Months Cash	10.2 months	13.18 months	19.13 months
Reserve Ratio Index	$\frac{\text{Fund Balance}}{\text{Avg. Monthly Exp.}}$	0.40 to 0.75	10.34 months	13.28 months	20.56 months
Projected FTE Variance - September 2024*	$\frac{\text{Actual FTE}}{\text{Budgeted FTE}}$	90.0%-94.9% of Budget	95.9%	94.2%	---

Note: Fund Balance is equal to Unrestricted Net Assets plus Net income

*School sponsor reporting requirement

IG Finance Advisory Committee Notes

- FY25 Network Projections

Total FY25 core program revenues for all two schools are projected to be \$6,929,513 while core program expenses are projected to be (\$8,421,443). After extraordinary items are included, the combined year-end core program surplus is projected to be \$156,177. A detailed budget-to-actual analysis is included within each organization's Monthly Financial Report.

- TIS and LIS Merger

At the June IG board meeting the Board of Directors approved a resolution to merge LIS and TIS. This merger combines the assets and liabilities of each school. The merger is not complete until a final audit of Lakeshore's assets and liabilities is completed.

Board Action Items

- 1) Continue discussions related to the need to ramp up philanthropic support.
- 2) Review and approve the Five Year Forecast.



Financial Report – September 2024

FY25 Projection

Total FY25 core program revenues for all two schools are projected to be \$6,929,513 while core program expenses are projected to be (\$8,421,443). After extraordinary items are included, the combined year-end core program surplus is projected to be \$156,177. A detailed budget-to-actual analysis is included within each organization's Monthly Financial Report.

Model Rollup (1)	TIS	NWIS	Total	IGC
FTE ENROLLMENT (2)	245.00	212.95	457.95	
REVENUE				
State Foundation (excl SPED) (3)	\$ 2,085,624	\$ 1,961,992	\$ 4,047,616	\$ -
CCIP Funding (excl Title VI-B)	263,795	163,382	427,178	-
Facilities Funding	245,000	226,000	471,000	-
Property Tax Levy	-	189,748	189,748	-
Casino	22,580	18,973	41,553	-
Charter School Equity Supplement	156,971	138,414	295,385	-
BASE REVENUE	2,773,970	2,698,510	5,472,480	-
State Foundation SPED	258,690	323,658	582,348	-
Title VI-B	51,111	65,947	117,058	-
Food Fund	126,000	89,552	215,552	-
Interest (4)	222,311	248,291	470,602	-
Other Revenues	61,386	10,086	71,472	568,256
OTHER REVENUE	719,498	737,534	1,457,033	568,256
TOTAL REVENUE	3,493,468	3,436,046	6,929,513	568,256
EXPENSES				
Instruction Staff	\$ (1,713,938)	\$ (2,047,250)	\$ (3,761,187)	\$ -
Admin/Ops Staff	(823,279)	(787,882)	(1,611,161)	(60,142)
Services & Supplies - Instruction	(655,257)	(545,799)	(1,201,056)	-
Services & Supplies - Administration(5)	(324,704)	(468,963)	(793,667)	(243,587)
Services & Supplies - Food Services	(165,000)	(85,602)	(250,602)	-
Services & Supplies - Facilities	(328,033)	(308,212)	(636,245)	-
Capital	-	-	-	-
Miscellaneous	(124,889)	(42,637)	(167,526)	(10,670)
TOTAL EXPENSES	(4,135,099)	(4,286,344)	(8,421,443)	(314,399)
CORE PROGRAM SURPLUS/(DEFICIT)	\$ (641,631)	\$ (850,298)	\$ (1,491,930)	\$ 253,857
EXTRAORDINARY REVENUE & EXPENSES				
Rent	(74,842)	(35,000)	(109,842)	-
IGC Base Support	399,138	90,000	489,138	(379,000)
HQ School Funding	698,250	570,561	1,268,811	-
SURPLUS/(DEFICIT) after extraordinary	\$ 380,915	\$ (224,738)	\$ 156,177	\$ (125,143)
EXTRAORDINARY REVENUE & EXPENSES				
LIS Expenses	(778,975)	-	(778,975)	-
SURPLUS/(DEFICIT) after extraordinary	\$ (398,060)	\$ (224,738)	\$ (622,798)	\$ (125,143)
PER STUDENT REVENUES	\$ 14,259	\$ 16,135	\$ 15,132	
PER STUDENT EXPENSES	\$ (16,878)	\$ (20,128)	\$ (18,389)	

Notes

- (1) Projections include FY25 accruals projected to be paid after 06/30/25.
- (2) Projected Enrollment is based on school expected year-end FTE
- (3) Projected state foundation revenue reflects most recent month's FTEs
- (4) Interest revenue received from Ohio STAR accounts are separated from Other Revenue in FY25.

The information in this report is based upon pre-audit accounting to facilitate ongoing financial management and planning.



Financial Report – September 2024

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 October 11, 2024. 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
September 30, 2024**

ASSETS	TIS	NWIS	Total	IGC
Current Assets				
Cash (1)	\$ 4,238,612	\$ 4,747,053	\$ 8,985,665	\$ 1,105,295
Accounts Receivable	511,831	358,687	870,518	-
Intranetwork Receivable	73,746	22,500	96,246	1,252
Other Current Assets	-	-	-	-
Total Current Assets	4,824,190	5,128,240	9,952,430	1,106,547
Non-Current Assets				
Capital Assets, net	1,208,832	28,330	1,237,162	72
Other Non-Current Assets	-	-	-	-
Total Non-Current Assets	1,208,832	28,330	1,237,162	72
TOTAL ASSETS	\$ 6,033,022	\$ 5,156,570	\$ 11,189,592	\$ 1,106,619
LIABILITIES				
Current Liabilities				
Accounts Payable	263,631	68,260	\$ 331,891	34,064
IGC Base Support	-	-	-	96,246
Wages and Benefits Payable (2)	241,407	263,901	505,308	5,358
Other Current Liabilities	37,332	-	37,332	-
Total Current Liabilities	542,370	332,161	874,531	135,668
Non-Current Liabilities				
Loan Payable	883,166	-	883,166	-
Capital Lease Payable	-	-	-	-
Total Non-Current Liabilities	883,166	-	883,166	-
TOTAL LIABILITIES	\$ 1,425,535	\$ 332,161	\$ 1,757,697	\$ 135,668
NET EQUITY				
Net Assets (3)				
Temp. Restricted - Capital	288,334	28,330	316,664	72
Other Restricted	19,330	13,658	32,988	(464)
Unrestricted Net Assets	4,299,822	4,782,422	9,082,244	1,187,812
TOTAL NET ASSETS (4)	4,607,487	4,824,409	9,431,896	970,951
TOTAL LIABILITIES AND NET ASSETS	\$ 6,033,022	\$ 5,156,570	\$ 11,189,593	\$ 1,106,620

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 – September 2024

Key Financials:

(in \$thousands)

o YTD Core Program Net Income	+\$119
o FY25 Core Program Projected Net Income	(\$642)
o FY25 Core Program Projected Budget Variance	(\$164)
o FY25 Projected Net Income w/ HQ funding and IGC	+\$381
o Month-end Cash Balance	+\$4,239
o Unrestricted Net Assets	+\$4,300

Fiscal Health:

Financial Benchmarks		Standard	TIS	Status
Liquidity Ratio Index*	$\frac{\text{Current Assets}}{\text{Current Liabilities}}$	1.0 to 1.1	8.89	Exceeds
Operating Cash Ratio*	$\frac{\text{Total Cash}}{\text{Avg. Monthly Exp.}}$	1.0 to 2.0 Months Cash	10.2 months	Exceeds
Reserve Ratio Index	$\frac{\text{**Fund Balance}}{\text{Avg. Monthly Exp.}}$	0.40 to 0.75	10.34 months	Exceeds
Projected FTE Variance - September 2024*	$\frac{\text{Actual FTE}}{\text{Budgeted FTE}}$	90.0%-94.9% of Budget	95.9%	Exceeds

*School sponsor reporting requirement

**Fund Balance is equal to Unrestricted Net Assets plus Net income.

Treasurer Notes:

o **FY25 Projection**

The Intergenerational School's FY25 surplus through September was \$119,230. The year-end surplus is projected to be \$380,915 based upon anticipated receipts and disbursements. FY25 Core Program Receipts are projected to be \$3,493,468, a favorable \$41,452 budget variance. The Core Program Expenses for FY25 are projected to be (\$4,135,099), an unfavorable (\$205,649) budget variance. As a result, the projected FY25 core budget variance is an unfavorable (\$641,631) based upon current revenue and expense assumptions.

Proposed Board Action Items:

- 1) **Continue discussions related to the need to ramp up philanthropic support.**
- 2) **Approve the October 5 year forecast.**

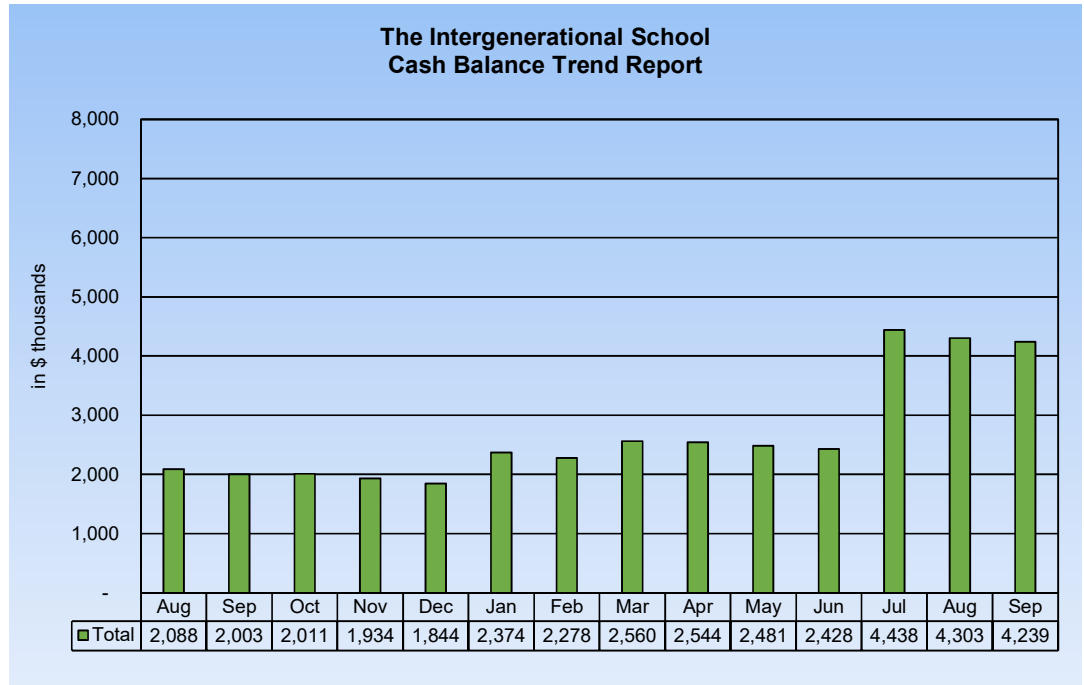


Financial Report – September 2024

Cash Position

The total cash balance for the The Intergenerational School was \$8,270 at the end of September. Unrestricted Funds closed the month at \$4,479,577. The Restricted Funds closed the month at (\$39,206). Cash flow trend details for the past 13 months are provided on the chart below. Increased cash position due to deposit of High Quality funding dollars in January, ESSER funds in March and the combined TIS/LIS bank balances in July.

MONTH END CASH BALANCE DETAIL	
Unrestricted Funds	
General	\$ 5,492,321
Food	(328,390)
IGC Expense	(684,354)
Subtotal	\$ 4,479,577
Restricted Funds	
ARP Homeless	\$ (1,023)
Athletic Fund	\$ (13,892)
Donate to Cancer	\$ 222
ESSER 3	\$ 27,273
Misc State	\$ 12,094
Parent Group	\$ 4,067
Playground Fund	\$ 9,500
Safety Grant	\$ 4,873
SCG	\$ (42,613)
Schoolwide	\$ (235,816)
Sensory	\$ 210
St. Luke's Grant	\$ 3,623
Title I, II-A, IV	\$ 21,453
Title VI-B	\$ (39,206)
Wellness	\$ 8,270
Subtotal	\$ (240,965)
Total	\$ 4,238,612



Bank Reconciliation

The table below provides a summary of The Intergenerational School reconciliation for the period ending September 30, 2024. The ending book balance was \$4,238,612. The ending bank statement balance was \$4,347,361. Outstanding checks (checks that have been sent, but not yet cashed) totaled \$108,750. Monthly interest from the STAR Ohio account was \$9,872.

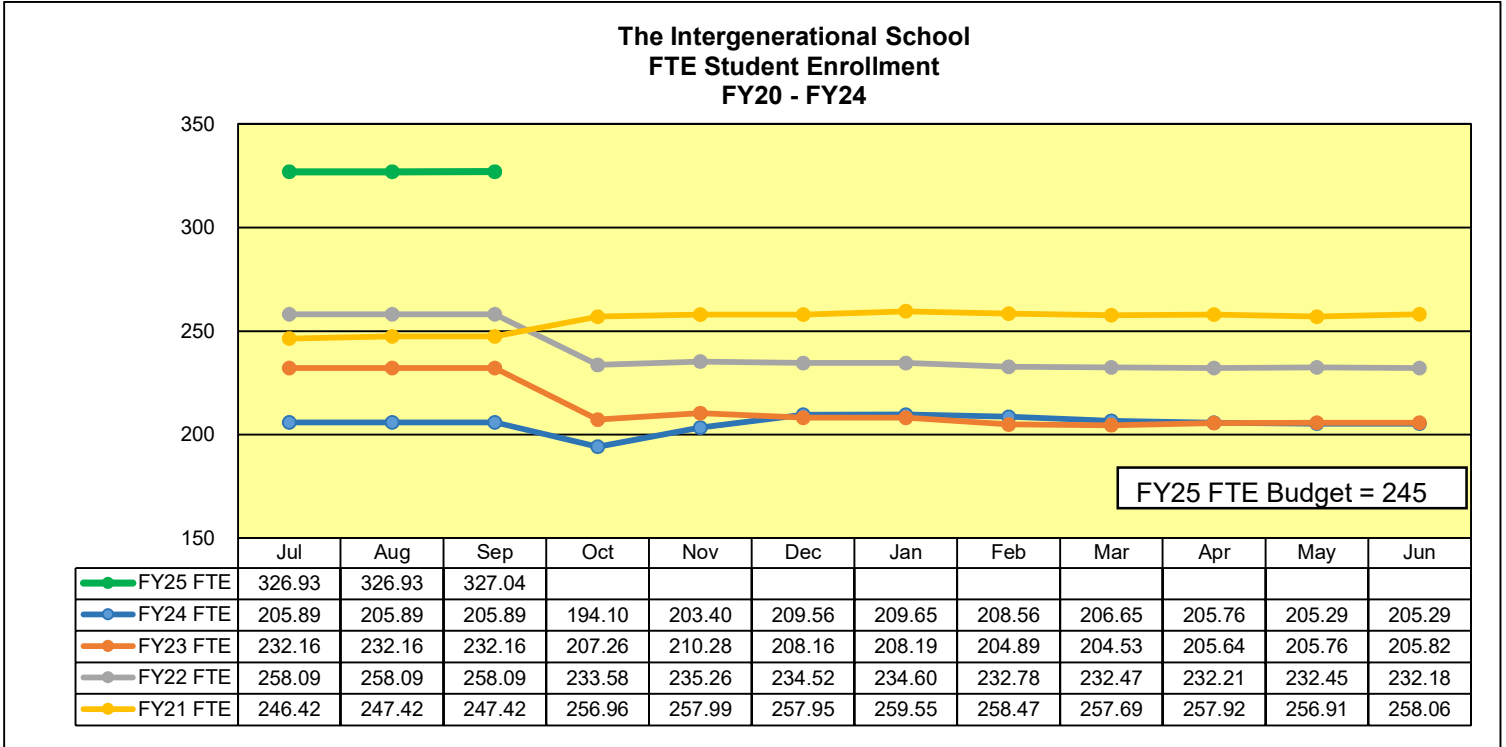
The Intergenerational School September 30, 2024	
Book Balance	
Beginning Book Balance	\$ 4,303,204
Ending Book Balance	\$ 4,238,612
Bank Balance	
Key Bank Balance	190,307
Erie Bank Balance	17,463
STAR Ohio Balance	4,139,591
Ending Bank Balance	\$ 4,347,361
Outstanding Checks & Deposits	108,750
Reconciled Cash Balance	\$ 4,238,612



Financial Report – September 2024

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 327.04 in September, which is 82.04 FTE above budget.



Federal Programs

The chart below provides a summary of the FY25 federal allocations for The Intergenerational School Consolidated Federal Programs (CCIP). Allocations are earmarked for salaries, benefits and professional development services. The CCIP allocation for FY25 is \$1,306,985. Disbursements have totaled \$139,991 year-to-date. Receipts have totaled \$0 year-to-date.

The Intergenerational School CCIP - Federal Education Programs						
Federal Program	Schoolwide	IDEA-B				Totals
FY25 Allocation	\$ 1,255,874	\$ 51,111				\$ 1,306,985
YTD Receipts	-	-				-
YTD Disbursements	138,698	1,294				139,991
Fund Balance	(138,698)	(1,294)				(139,991)
Encumbered Funds	1,117,176	49,817				1,166,994
Allocation Balance	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -

The information in this report is based upon pre-audit accounting to facilitate ongoing financial management and planning.



Financial Report – September 2024

FY25 Projection

The Intergenerational School's FY25 surplus through September was \$119,230. The year-end surplus is projected to be \$380,915 based upon anticipated receipts and disbursements. FY25 Core Program Receipts are projected to be \$3,493,468, a favorable \$41,452 budget variance. The Core Program Expenses for FY25 are projected to be (\$4,135,099), an unfavorable (\$205,649) budget variance. As a result, the projected FY25 core budget variance is an unfavorable (\$641,631) based upon current revenue and expense assumptions.

	YTD Actual (1)	FY25 Projection (2)	FY25 Act + Proj	FY25 Budget (3)	Budget Variance
FTE ENROLLMENT (4)	327.04	(82.04)	245.00	245.00	0.00
REVENUE					
State Foundation (excl SPED) (5)	\$ 710,361	\$ 1,375,263	\$ 2,085,624	\$ 2,116,954	\$ (31,330)
CCIP Funding (excl Title VI-B)	-	263,795	263,795	211,538	52,257
Facilities Funding	81,759	163,241	245,000	245,000	-
Property Tax Levy	-	-	-	-	-
Casino	6,593	15,987	22,580	22,580	-
Charter School Equity Supplement	53,144	103,827	156,971	156,971	-
BASE REVENUE	851,857	1,922,113	2,773,970	2,753,043	20,927
State Foundation SPED	114,789	143,901	258,690	258,690	-
Title VI-B	-	51,111	51,111	51,111	-
Food Fund	-	126,000	126,000	126,000	-
Interest (6)	31,107	191,204	222,311	201,786	20,525
Other Revenues	3,164	58,222	61,386	61,386	-
OTHER REVENUE	149,061	570,437	719,498	698,973	20,525
TOTAL REVENUE	1,000,918	2,492,551	3,493,468	3,452,016	41,452
EXPENSES					
Instruction Staff	\$ (263,876)	\$ (1,450,062)	\$ (1,713,938)	\$ (1,669,109)	\$ (44,829)
Admin/Ops Staff	(190,130)	(633,149)	(823,279)	(766,937)	(56,342)
Services & Supplies - Instruction	(85,249)	(570,008)	(655,257)	(639,663)	(15,594)
Services & Supplies - Administration	(171,282)	(153,423)	(324,704)	(275,934)	(48,770)
Services & Supplies - Food Services	(14,050)	(150,950)	(165,000)	(140,000)	(25,000)
Services & Supplies - Facilities	(85,330)	(242,702)	(328,033)	(392,550)	64,517
Miscellaneous	(71,770)	(53,118)	(124,889)	(45,258)	(79,631)
TOTAL EXPENSES	(881,688)	(3,253,412)	(4,135,099)	(3,929,451)	(205,649)
SURPLUS/DEFICIT	\$ 119,230	\$ (760,861)	\$ (641,631)	\$ (477,435)	\$ (164,196)
EXTRAORDINARY REVENUE & EXPENSES					
Rent	-	(74,842)	(74,842)	(74,842)	-
IGC Base Support	-	399,138	399,138	399,138	-
HQ School Funding	-	698,250	698,250	698,250	-
SURPLUS/DEFICIT incl Extraordinary Items	\$ 119,230	\$ 261,685	\$ 380,915	\$ 545,111	\$ (164,196)
LIS Expenses (7)	(80,899)	(698,076)	(778,975)	(782,492)	3,517
SURPLUS/DEFICIT after LIS obligations	\$ 38,331	\$ (436,391)	\$ (398,060)	\$ (237,381)	\$ (160,679)

Notes

- (1) YTD Actuals are cash transactions for FY25 activities for the period of 07/01/24 to 09/30/24 (excludes FY23 activity).
- (2) FY25 Projections are anticipated cash transactions for FY25 (includes FY25 accruals projected to be paid after 06/30/25).
- (3) FY25 Budget based upon the Board approved budget.
- (4) Projected enrollment is based on the expected year end enrollment.
- (5) Increase in state foundation funding attributed to the combined 2023-2024 FTE totals for LIS and TIS.
- (6) Interest revenue received from Ohio STAR accounts are separated from Other Revenue in FY25.
- (7) LIS merger obligations actuals and projections will be tracked until the completion of the school's final audit.

The information in this report is based upon pre-audit accounting to facilitate ongoing financial management and planning.



Financial Report – September 2024

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 October 14, 2024. 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 September 2024 and September 2023

ASSETS	9/30/2024 (1)	9/30/2023	\$ Change
Current Assets			
Cash	\$ 4,238,612	\$ 2,002,753	\$ 2,235,859
Accounts Receivable	511,831	456,992	54,839
IGC Receivable	73,746	10,880	62,866
Other Current Assets	-	-	-
Total Current Assets	4,824,190	2,470,625	2,353,565
Non-Current Assets			
Capital Assets, net	1,208,832	1,268,463	(59,631)
Other Non-Current Assets	-	-	-
Total Non-Current Assets	1,208,832	1,268,463	(59,631)
TOTAL ASSETS	\$ 6,033,022	\$ 3,739,088	\$ 2,293,934
LIABILITIES			
Current Liabilities			
Accounts Payable	263,631	120,182	143,449
Wages & Benefits Payable (2)	241,407	91,471	149,936
Loan Payable	37,332	35,773	1,559
Total Current Liabilities	542,370	247,426	294,944
Non-Current Liabilities			
Note Payable	883,166	849,332	33,834
Other Non-Current Liabilities	-	-	-
Total Non-Current Liabilities	883,166	849,332	33,834
TOTAL LIABILITIES	\$ 1,425,535	\$ 1,096,758	\$ 328,777
NET EQUITY			
Net Assets			
Invested in Capital Assets, net	288,334	383,358	(95,024)
Restricted	19,330	43,940	(24,610)
Unrestricted	4,299,822	2,215,031	2,084,791
TOTAL NET ASSETS (3)	4,607,486	2,642,330	1,965,156
TOTAL LIABILITIES & NET ASSETS	\$ 6,033,022	\$ 3,739,088	\$ 2,293,934

Notes

- (1) Balance sheet information includes LIS asset and liability information.
- (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 – September 2024

Key Financials:

(in \$thousands)

o YTD Net Income	(\$101)
o FY25 Projected Net Income	(\$125)
o FY25 Projected Budget Variance	(\$3)
o Month-end Cash Balance	+\$1,105
o Unrestricted Net Assets	+\$1,188

Fiscal Health:

Benchmarks		IGC
Liquidity Ratio Index	$\frac{\text{Current Assets}}{\text{Current Liabilities}}$	8.16
Operating Cash Ratio	$\frac{\text{Total Cash}}{\text{Avg. Monthly Exp.}}$	19.13 months
Reserve Ratio Index	$\frac{\text{Fund Balance}}{\text{Avg. Monthly Exp.}}$	20.56 months

Note: Fund Balance is equal to Unrestricted Net Assets plus Net income.

Treasurer Notes:

o **FY25 Projection**

Intergenerational Cleveland's FY25 deficit through September was (\$196,002). The year-end deficit is projected to be (\$124,760) based upon anticipated receipts and disbursements. FY25 Core Program Receipts are projected to be \$568,639, a favorable \$1,139 budget variance. The Core Program Expenses for FY25 are projected to be (\$314,399), an unfavorable (\$3,746) budget variance. As a result, the projected FY25 core budget variance is an unfavorable (\$2,607) based upon current revenue and expense assumptions.

Proposed Board Action Items:

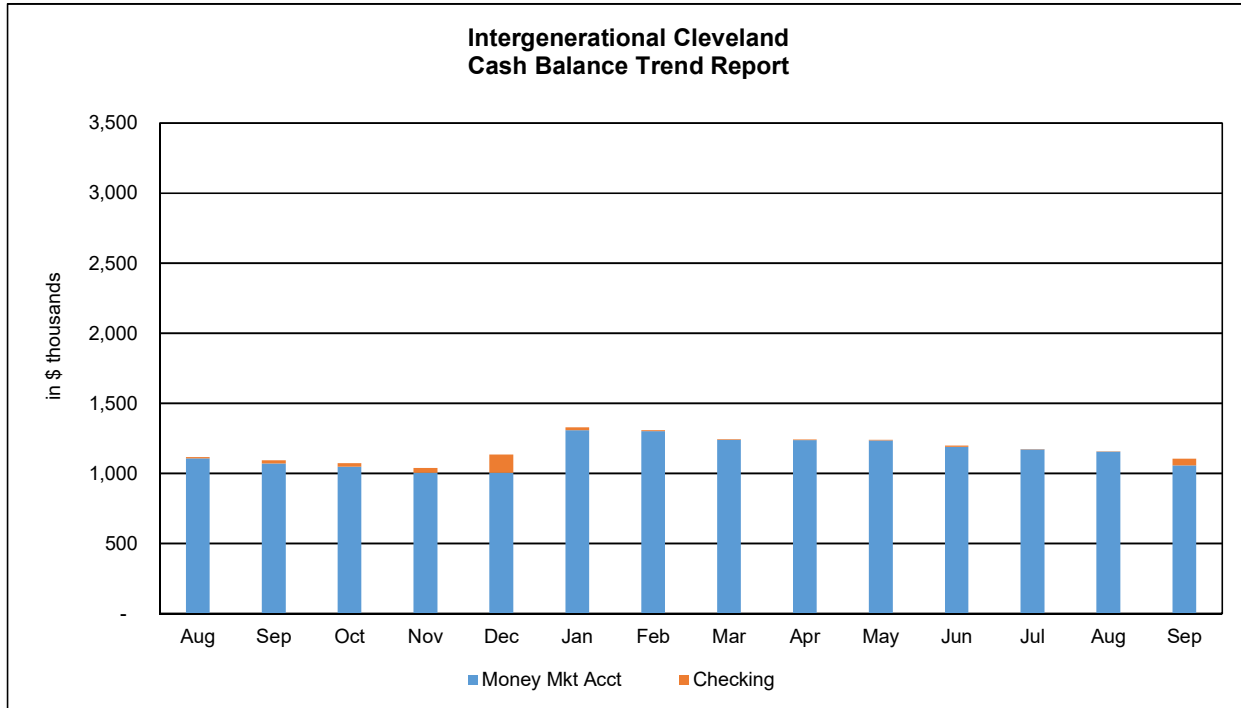
- 1) **Continue planning related to IGC long-term financial goals, including specific benchmarks related to revenue generation and/or expenses reduction objectives for FY26 and beyond.**
- 2) **Continue discussions related to the need to ramp up philanthropic support.**



Financial Report – September 2024

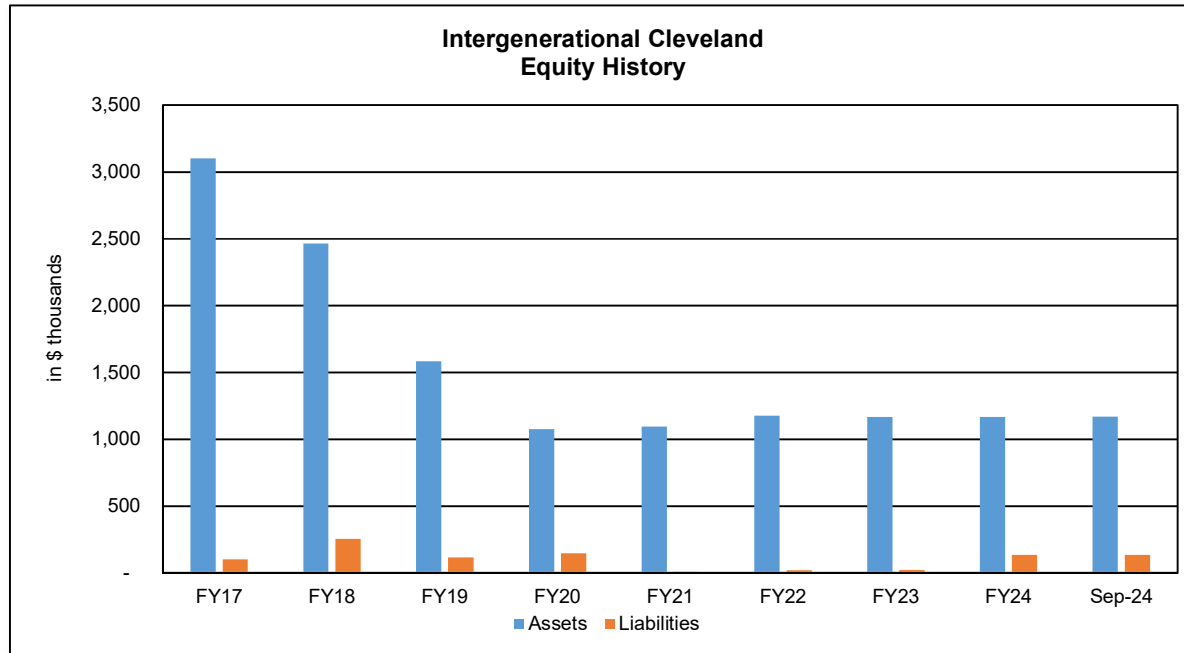
Cash Position

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 September 2024. Both assets and liabilities reduced significantly during FY17 to FY20 as a result of Base Support distributions to the schools. FY24 & September 2024 are 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 – September 2024

FY25 Projection

Intergenerational Cleveland's FY25 deficit through September was (\$196,002). The year-end deficit is projected to be (\$124,760) based upon anticipated receipts and disbursements. FY25 Core Program Receipts are projected to be \$568,639, a favorable \$1,139 budget variance. The Core Program Expenses for FY25 are projected to be (\$314,399), an unfavorable (\$3,746) budget variance. As a result, the projected FY25 core budget variance is an unfavorable (\$2,607) based upon current revenue and expense assumptions.

	YTD Actual (1)	FY25 Projection (2)	FY25 Act + Proj	FY25 Budget (3)	Budget Variance
REVENUE					
Direct Support	\$ 3,297	\$ 526,703	\$ 530,000	\$ 530,000	\$ -
School Revenues	-	37,500	37,500	37,500	-
Other Revenues	1,139	-	1,139	-	1,139
TOTAL REVENUE	4,436	564,203	568,639	567,500	1,139
EXPENSES					
Admin/Ops Staff	\$ (15,126)	\$ (45,016)	\$ (60,142)	\$ (56,567)	\$ (3,575)
Purchased Services (excl rent)	(81,158)	(152,542)	(233,700)	(233,700)	-
Supplies	(8,970)	(917)	(9,887)	(10,000)	113
Other Expenses	(434)	(10,236)	(10,670)	(10,386)	(284)
TOTAL EXPENSES	(105,688)	(208,711)	(314,399)	(310,653)	(3,746)
CORE PROGRAM SURPLUS/DEFICIT	\$ (101,252)	\$ 355,492	\$ 254,240	\$ 256,847	\$ (2,607)
EXTRAORDINARY REVENUE & EXPENSES					
IGC Base Support	\$ (94,750)	\$ (284,250)	\$ (379,000)	\$ (379,000)	\$ 0
SURPLUS/DEFICIT incl Extraordinary Item	\$ (196,002)	\$ 71,242	\$ (124,760)	\$ (122,153)	\$ (2,607)

Notes

- 1 YTD Actuals are cash transactions for FY25 activities for the period of 07/01/25 to 09/30/24 (excludes prior FY activity).
- 2 FY25 Projections are anticipated cash transactions for remaining FY25 activity (includes FY25 accruals to be paid/rec'd after 06/30/24).
- 3 FY25 Budget is based upon the approved budget.



Financial Report – September 2024

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 October 14, 2024. 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 September 2024 and September 2023
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ASSETS	9/30/2024	9/30/2023	\$ Change
Current Assets			
Cash	\$ 1,105,295	\$ 1,033,360	\$ 71,935
Accounts Receivable	-	74,627	(74,627)
Intranetwork Receivable (1)	1,252	1,252	-
Other Current Assets	-	18,663	(18,663)
Total Current Assets	1,106,547	1,127,902	(21,355)
Non-Current Assets			
Capital Assets, net	\$ 72	\$ 187	\$ (115)
Other Non-Current Assets	-	-	-
Total Non-Current Assets	72	187	(115)
TOTAL ASSETS	\$ 1,106,619	\$ 1,128,089	\$ (21,470)
LIABILITIES			
Current Liabilities			
Accounts Payable	\$ 34,064	\$ 2,750	\$ 31,314
IGC Base Support	96,246	82,461	13,786
Wages & Benefits Payable	5,358	14,547	(9,189)
Other Current Liabilities	-	-	-
Total Current Liabilities	135,668	99,758	35,911
Non-Current Liabilities			
Note Payable	\$ -	\$ -	\$ -
Other Non-Current Liabilities	-	-	-
Total Non-Current Liabilities	-	-	-
TOTAL LIABILITIES	\$ 135,668	\$ 99,758	\$ 35,911
NET EQUITY			
Net Assets			
Invested in Capital Assets, net	\$ 72	\$ 187	\$ (115)
Restricted	(464)	15,000	(15,464)
Unrestricted	1,187,812	1,139,272	48,540
TOTAL NET ASSETS (2)	970,951	1,028,332	(57,381)
TOTAL LIABILITIES & NET ASSETS	\$ 1,106,619	\$ 1,128,089	\$ (21,470)

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 – September 2024

Key Financials:

(in \$thousands)

o YTD Core Program Net Income	+\$163
o FY25 Core Program Projected Net Income	(\$850)
o FY25 Core Program Projected Budget Variance	(\$99)
o FY25 Projected Net Income w/ HQ funding and IGC	(\$225)
o Month-end Cash Balance	+\$4,747
o Unrestricted Net Assets	+\$4,782

Fiscal Health:

Financial Benchmarks		Standard	NWIS	Status
Liquidity Ratio Index*	$\frac{\text{Current Assets}}{\text{Current Liabilities}}$	1.0 to 1.1	15.44	Exceeds
Operating Cash Ratio*	$\frac{\text{Total Cash}}{\text{Avg. Monthly Exp.}}$	1.0 to 2.0 Months Cash	13.18 months	Exceeds
Reserve Ratio Index	$\frac{\text{**Fund Balance}}{\text{Avg. Monthly Exp.}}$	0.40 to 0.75	13.28 months	Exceeds
Projected FTE Variance - September 2024*	$\frac{\text{Actual FTE}}{\text{Budgeted FTE}}$	90.0%-94.9% of Budget	94.2%	Meets

*School sponsor reporting requirement

**Fund Balance is equal to Unrestricted Net Assets plus Net income.

Treasurer Notes:

o **FY25 Projection**

Near West Intergenerational School's FY25 surplus through September was \$163,239. The year-end deficit is projected to be (\$224,738) based upon anticipated receipts and disbursements. FY25 Core Program Receipts are projected to be \$3,436,045, a favorable \$55,635 budget variance. The Core Program Expenses for FY25 are projected to be (\$4,286,344), an unfavorable (\$154,228) budget variance. As a result, the projected FY25 core budget variance is an unfavorable (\$98,593) based upon current revenue and expense assumptions.

Proposed Board Action Items:

- 1) Continue discussions related to the need to ramp up philanthropic support.
- 2) Approve and review the 5 year forecast.

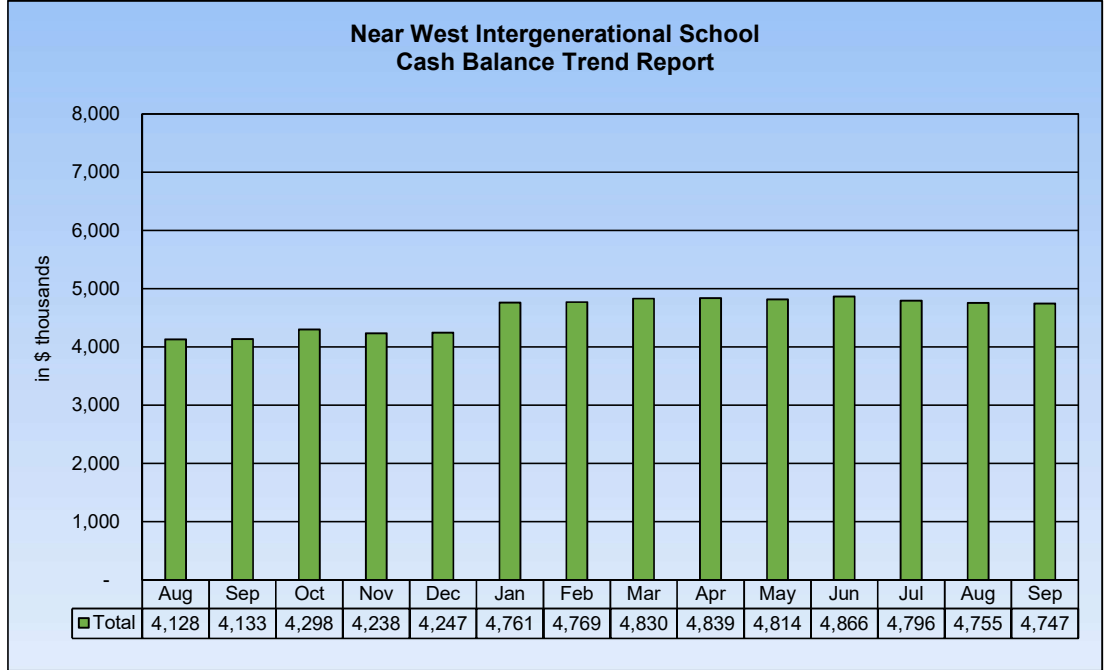


Financial Report – September 2024

Cash Position

The total cash balance for the Near West Intergenerational School was \$4,747,053 at the end of September. Unrestricted Funds closed the month at \$4,825,403. The Restricted Funds closed the month at (\$78,350). Cash flow trend details for the past 13 months are provided on the chart below. Increase in cash funding in January was due to High Quality funding received.

MONTH END CASH BALANCE DETAIL	
Unrestricted Funds	
General	\$ 5,023,569
Food	\$ (131,082)
IGC Expenses	\$ (67,083)
Subtotal	\$ 4,825,403
Restricted Funds	
ARP Homeless	\$ (2,132)
ARP IDEA	\$ (338)
Athletic	\$ 55
EOEC	\$ (15,840)
ESSER 3	\$ (2,415)
Misc State	\$ 12,420
Parent	\$ 1,184
SCG	\$ (5,177)
Schoolwide	\$ (64,282)
Title VI-B	\$ (7,155)
Wellness	\$ 5,330
	\$ -
Subtotal	\$ (78,350)
Total	\$ 4,747,053



Bank Reconciliation

The table below provides a summary of Near West Intergenerational School reconciliation for the period ending September 30, 2024. The ending book balance was \$4,747,053. The ending bank statement balance was \$4,772,714. Outstanding checks (checks that have been sent, but not yet cashed) totaled (\$25,660). Monthly interest from the STAR Ohio account was \$20,045.

Near West Intergenerational School	
September 30, 2024	
Book Balance	
Beginning Book Balance	\$ 4,755,314
Ending Book Balance	\$ 4,747,053
Bank Balance	
Key Bank Balance	141,193
STAR Ohio Balance	4,631,521
Ending Bank Balance	\$ 4,772,714
Outstanding Checks	(25,660)
Reconciled Cash Balance	\$ 4,747,053

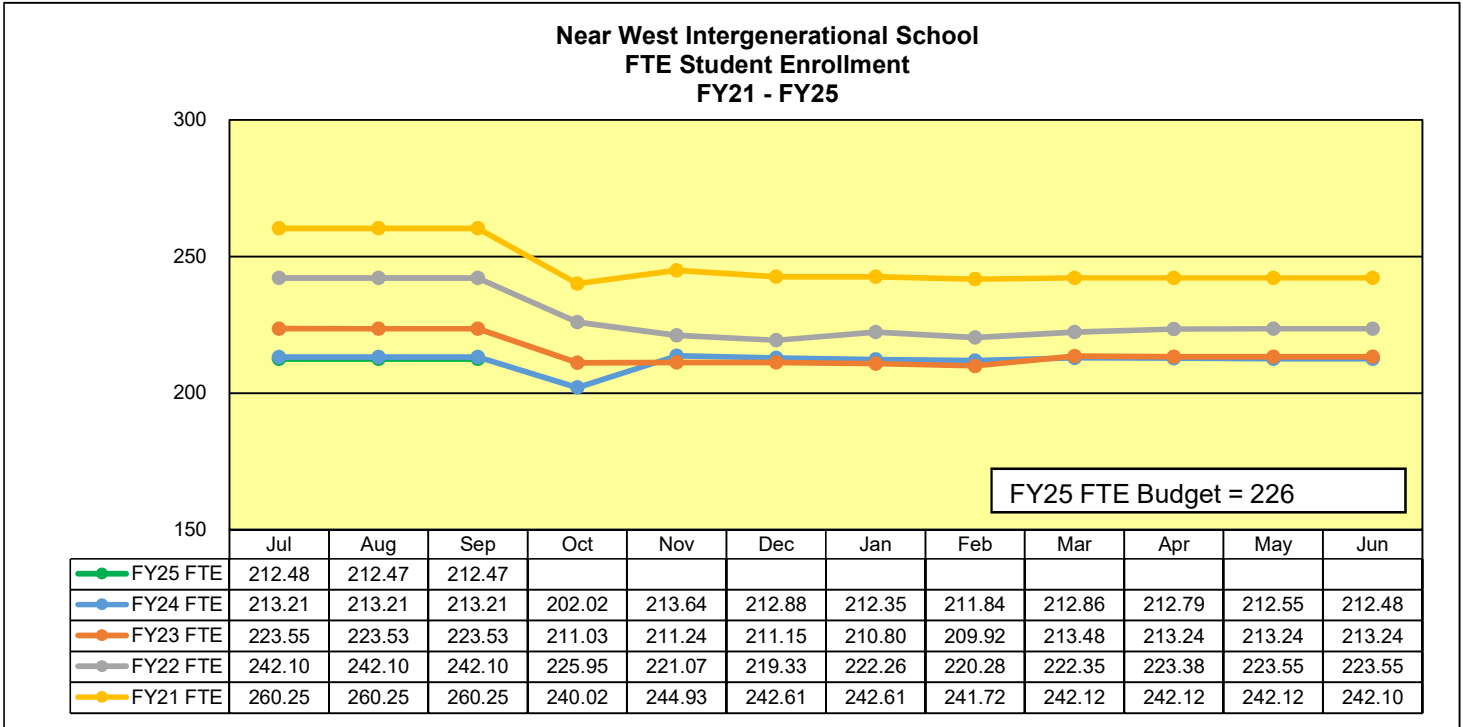
The information in this report is based upon pre-audit accounting to facilitate ongoing financial management and planning.



Financial Report – September 2024

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 212.47 in September, which is 25.53 FTE below budget.



Federal Programs

The chart below provides a summary of the FY25 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 FY25 is \$747,971. Disbursements have totaled \$108,587 year-to-date. Receipts have totaled \$96,856 year-to-date.

Near West Intergenerational School CCIP - Federal Education Programs						
Federal Program	Schoolwide	IDEA-B				Totals
FY25 Allocation	\$ 685,934	\$ 62,037				\$ 747,971
YTD Receipts	90,770	6,087				96,856
YTD Disbursements	98,867	9,719				108,587
Fund Balance	(8,098)	(3,633)				(11,730)
Encumbered Funds	587,066	52,317				639,384
Allocation Balance	\$ -	\$ -				\$ -



Financial Report – September 2024

FY25 Projection

Near West Intergenerational School's FY25 surplus through September was \$163,239. The year-end deficit is projected to be (\$224,738) based upon anticipated receipts and disbursements. FY25 Core Program Receipts are projected to be \$3,436,045, a favorable \$55,635 budget variance. The Core Program Expenses for FY25 are projected to be (\$4,286,344), an unfavorable (\$154,228) budget variance. As a result, the projected FY25 core budget variance is an unfavorable (\$98,593) based upon current revenue and expense assumptions.

	YTD Actual (1)	FY25 Projection (2)	FY25 Act + Proj	FY25 Budget (3)	Budget Variance
FTE ENROLLMENT (4)	212.47	0.48	212.95	226.00	(13.05)
REVENUE					
State Foundation (excl SPED) (5)	\$ 470,527	\$ 1,491,465	\$ 1,961,992	\$ 1,970,382	\$ (8,390)
CCIP Funding (excl Title VI-B)	16,616	146,767	163,382	136,834	26,548
Facilities Funding	53,118	172,882	226,000	226,000	-
Property Tax Levy	-	189,748	189,748	189,748	-
Casino	7,024	11,949	18,973	18,973	-
Charter School Equity Supplement	34,527	103,888	138,414	147,267	(8,853)
BASE REVENUE	581,812	2,116,699	2,698,510	2,689,204	9,306
State Foundation SPED	86,854	236,805	323,658	309,357	14,301
Title VI-B	6,087	59,860	65,947	62,037	3,910
Food Fund	-	89,552	89,552	89,552	(0)
Interest	63,139	185,152	248,291	220,174	28,117
Other Revenues	822	9,264	10,086	10,086	-
OTHER REVENUE	156,902	580,633	737,534	691,206	46,328
TOTAL REVENUE	738,713	2,697,332	3,436,045	3,380,410	55,635
EXPENSES					
Instruction Staff	\$ (247,481)	\$ (1,799,768)	\$ (2,047,250)	\$ (2,002,671)	\$ (44,579)
Admin/Ops Staff	(136,342)	(651,539)	(787,882)	(814,039)	26,157
Services & Supplies - Instruction (5)	(78,386)	(467,413)	(545,799)	(465,790)	(80,009)
Services & Supplies - Administration	(72,880)	(396,083)	(468,963)	(440,511)	(28,452)
Services & Supplies - Food Services	(10,602)	(75,000)	(85,602)	(100,000)	14,398
Services & Supplies - Facilities	(29,456)	(278,756)	(308,212)	(270,968)	(37,244)
Capital	-	-	-	-	-
Miscellaneous	(326)	(42,311)	(42,637)	(38,137)	(4,500)
TOTAL EXPENSES	(575,474)	(3,710,870)	(4,286,344)	(4,132,116)	(154,228)
SURPLUS/DEFICIT	\$ 163,239	\$ (1,013,538)	\$ (850,299)	\$ (751,706)	\$ (98,593)
EXTRAORDINARY REVENUE & EXPENSES					
Rent	-	(35,000)	(35,000)	(35,000)	-
IGC Base Support	-	90,000	90,000	90,000	-
HQ School Funding	-	570,561	570,561	570,561	-
SURPLUS/DEFICIT incl Extraordinary Items	\$ 163,239	\$ (387,977)	\$ (224,738)	\$ (126,145)	\$ (98,593)

- Notes
- (1) YTD Actuals are cash transactions for FY25 activities for the period of 07/01/24 to 09/30/24 (excludes FY24 activity).
 - (2) FY25 Projections are anticipated cash transactions for remaining FY25 activity (includes FY25 accruals to be paid/rec'd after 06/30/25).
 - (3) FY25 Budget based upon the July Board approved budget.
 - (4) Projected enrollment is based on the expected year end enrollment.
 - (5) Negative budget variance attributed to College Now consulting invoice.

The information in this report is based upon pre-audit accounting to facilitate ongoing financial management and planning.



Financial Report – September 2024

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 October 14, 2024. 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
September 2024 and September 2023**

ASSETS	9/30/2024	9/30/2023	\$ Change
Current Assets			
Cash	\$ 4,747,053	\$ 4,120,888	\$ 626,165
Accounts Receivable	358,687	64,461	294,226
IGC Receivable	22,500	-	22,500
Other Current Assets	-	-	-
Total Current Assets	5,128,240	4,185,349	942,891
Non-Current Assets			
Capital Assets, net	28,330	38,063	(9,733)
Other Non-Current Assets	-	-	-
Total Non-Current Assets	28,330	38,063	(9,733)
TOTAL ASSETS	\$ 5,156,570	\$ 4,223,412	\$ 933,158
LIABILITIES			
Current Liabilities			
Accounts Payable	\$ 68,260	\$ 691,015	\$ (622,755)
Wages & Benefits Payable (1)	263,901	89,231	174,670
Loan Payable	-	-	-
Total Current Liabilities	332,161	780,246	(448,085)
Non-Current Liabilities			
Note Payable	-	-	-
Other Non-Current Liabilities	-	-	-
Total Non-Current Liabilities	-	-	-
TOTAL LIABILITIES	\$ 332,161	\$ 780,246	\$ (448,085)
NET EQUITY			
Net Assets			
Invested in Capital Assets, net	28,330	38,063	(9,733)
Restricted	13,658	69,330	(55,672)
Unrestricted	4,782,422	3,335,772	1,446,650
TOTAL NET ASSETS (2)	4,824,410	3,443,166	1,381,244
TOTAL LIABILITIES & NET ASSETS	\$ 5,156,570	\$ 4,223,412	\$ 933,158

Notes

- (1) Wage and Benefits Obligations include stretch pay for teachers and associated benefits.
- (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.

Coversheet

Approval of the Five-Year Forecast for Submission to the Ohio Department of Education and Workforce

Section: IV. Finance
Item: B. Approval of the Five-Year Forecast for Submission to the Ohio
Department of Education and Workforce
Purpose: Vote
Submitted by:
Related Material: TIS Oct 24 5 Year Forecast.xlsx
NWIS Oct 2024 5 Year Forecast.xlsx

Notice

The following file is attached to this PDF. You will need to open this packet in an application that supports attachments to pdf files, e.g. [Adobe Reader](#):

TIS Oct 24 5 Year Forecast.xlsx

Notice

The following file is attached to this PDF. You will need to open this packet in an application that supports attachments to pdf files, e.g. [Adobe Reader](#):

NWIS Oct 2024 5 Year Forecast.xlsx

Coversheet

Approval of the Annual Budget for Submission to Ohio Department of Education & Workforce

Section: IV. Finance
Item: C. Approval of the Annual Budget for Submission to Ohio Department of Education & Workforce
Purpose:
Submitted by:
Related Material: 504. Annual Budget TIS.xlsx
504. Annual Budget NWIS.xlsx
Oct 24 NWIS.pdf
Oct 24 TIS.pdf

Notice

The following file is attached to this PDF. You will need to open this packet in an application that supports attachments to pdf files, e.g. [Adobe Reader](#):

504. Annual Budget TIS.xlsx

Notice

The following file is attached to this PDF. You will need to open this packet in an application that supports attachments to pdf files, e.g. [Adobe Reader](#):

504. Annual Budget NWIS.xlsx

FY25 - October 2024 Submission
IRN No.: 012030
Type of School: Brick and Mortar
Contract Term: 06/30/2029

NEAR WEST INTERGENERATIONAL SCHOOL								
Statement of Receipt, Disbursements, and Changes in Fund Cash Balances								
For the Fiscal Years Ended 2022 through 2024, Actual and								
the Fiscal Years Ending 2025 through 2029, Forecasted								
			Forecast					
Fiscal Year FY22	Fiscal Year FY23	Fiscal Year FY24	Fiscal Year FY25	Fiscal Year FY26	Fiscal Year FY27	Fiscal Year FY28	Fiscal Year FY29	
Operating Receipts								
State Foundation Payments (3110, 3211)	2,677,273	1,821,203	2,379,087	2,595,645	2,734,639	2,875,930	3,007,757	3,034,633
Charges for Services (1500)	-	-	-	-	-	-	-	-
Fees (1600, 1700)	5,626	-	-	-	-	-	-	-
Other (1830, 1840, 1850, 1860, 1870, 1890, 3190)	283,726	735,453	1,048,372	911,489	867,592	878,695	318,127	318,127
Total Operating Receipts	2,966,625	2,556,656	3,427,459	3,507,134	3,602,231	3,754,625	3,325,884	3,352,760
Operating Disbursements								
100 Salaries and Wages	1,428,443	1,451,626	1,500,384	2,254,428	2,276,972	2,345,742	2,370,120	2,394,768
200 Employee Retirement and Insurance Benefits	339,788	357,040	509,023	562,281	567,904	573,583	579,319	585,112
400 Purchased Services	736,706	1,370,066	865,611	1,157,089	1,135,277	1,157,282	1,179,728	1,202,622
500 Supplies and Materials	186,396	151,540	92,642	155,180	158,284	159,368	162,556	165,807
600 Capital Outlay -New	-	-	-	-	-	-	-	-
700 Capital Outlay - Replacement	-	-	-	-	-	-	-	-
800 Other	23,031	17,963	29,809	37,784	38,539	39,310	40,096	40,898
819 Other Debt	-	-	-	-	-	-	-	-
Total Operating Disbursements	2,714,363	3,348,235	2,997,469	4,166,762	4,176,976	4,275,286	4,331,818	4,389,208
Excess of Operating Receipts Over (Under)								
Operating Disbursements	252,262	(791,579)	429,990	(659,628)	(574,745)	(520,661)	(1,005,934)	(1,036,448)
Nonoperating Receipts/(Disbursements)								
Federal Grants (all 4000 except fund 532)	795,979	1,380,244	392,444	506,472	528,882	551,293	571,462	571,462
State Grants (3200, except 3211)	2,404	-	-	-	-	-	-	-
Restricted Grants (3219, Community School Facilities Grant)	-	-	-	-	-	-	-	-
Donations (1820)	27,126	15,765	-	-	-	-	-	-
Interest Income (1400)	558	107,051	-	220,174	229,916	239,658	248,426	248,426
Debt Proceeds (1900)	-	-	-	-	-	-	-	-
Debt Principal Retirement	-	(5,826)	-	-	-	-	-	-
Interest and Fiscal Charges	-	(513)	-	-	-	-	-	-
Transfers - In	-	-	-	-	-	-	-	-
Transfers - Out	-	-	-	-	-	-	-	-
Total Nonoperating Revenues/(Expenses)	826,067	1,496,721	392,444	726,646	758,799	790,951	819,888	819,888
Excess of Operating and Nonoperating Receipts Over/(Under) Operating and Nonoperating Disbursements	1,078,329	705,142	822,434	67,018	184,054	270,290	(186,046)	(216,559)
Fund Cash Balance Beginning of Fiscal Year	2,258,060	3,336,389	4,041,531	4,863,965	4,930,983	5,115,037	5,385,327	5,199,281
Fund Cash Balance End of Fiscal Year	3,336,389	4,041,531	4,863,965	4,930,983	5,115,037	5,385,327	5,199,281	4,982,722

FY25 - October 2024 Submission
IRN No.: 012030
Type of School: Brick and Mortar
Contract Term: 06/30/2029

Staffing/Enrollment

Total Student FTE
 Instructional Staff
 Administrative Staff
 Other Staff

NEAR WEST INTERGENERATIONAL SCHOOL								
Statement of Receipt, Disbursements, and Changes in Fund Cash Balances								
For the Fiscal Years Ended 2022 through 2024, Actual and								
the Fiscal Years Ending 2025 through 2029, Forecasted								
242	224	213	226	236	246	255	255	
25	26	25	28	28	28	28	28	28
9	11	9	10	10	10	10	10	10
-	-	-	-	-	-	-	-	-

Purchased Services

Rent
 Utilities
 Other Facility Costs
 Insurance
 Insurance (USAS code of 851 - incl in Other)
 Management Fee
 Sponsor Fee
 Audit Fees
 Audit Fees (USAS code of 843 - incl in Other)
 Contingency
 Transportation
 Legal
 Marketing
 Consulting
 Salaries and Wages
 Employee Benefits
 Special Education Services
 Technology Services
 Food Services
 Other
Total Purchased Services

35,000	35,200	35,000	35,000	35,000	35,000	35,000	35,000	35,000
-	-	-	43,268	44,134	45,016	45,917	46,835	46,835
126,820	98,727	106,650	217,235	221,580	226,011	230,532	235,142	235,142
-	-	-	-	-	-	-	-	-
8,603	5,129	6,591	19,881	20,279	20,684	21,098	21,520	21,520
-	-	-	-	-	-	-	-	-
34,600	50,745	7,958	67,039	68,380	69,747	71,142	72,565	72,565
-	-	-	-	-	-	-	-	-
10,985	11,221	11,332	12,000	12,240	12,485	12,734	12,989	12,989
-	-	-	-	-	-	-	-	-
-	2,250	14,977	41,500	42,000	42,840	43,697	44,571	44,571
4,890	5,177	4,918	7,000	7,140	7,283	7,428	7,577	7,577
4,468	6,751	19,012	34,832	39,850	40,647	41,460	42,289	42,289
47,671	148,471	190,077	106,200	1,224	1,248	1,273	1,299	1,299
-	-	-	-	-	-	-	-	-
-	-	-	-	-	-	-	-	-
156,683	180,438	217,123	205,000	163,200	166,464	169,793	173,189	173,189
99,600	89,645	70,237	130,225	132,830	135,486	138,196	140,960	140,960
37,013	119,301	112,984	100,000	102,000	104,040	106,121	108,243	108,243
-	-	-	-	-	-	-	-	-
566,331	753,056	796,859	1,019,180	889,855	906,952	924,392	942,179	942,179

Financial Metrics

Expenditures per FTE
 Debt Service Payments
 Debt Service Coverage
 Growth in Enrollment
 Growth in New Capital Outlay
 Growth in Operating Receipts
 Growth in Non-Operating Receipts/Expenses
 Days of Cash

11,212	14,978	14,073	18,437	17,699	17,379	16,988	17,213	
-	513	-	-	-	-	-	-	-
0.00	239.41	0.00	0.00	0.00	0.00	0.00	0.00	0.00
0.0%	4.0%	-3.8%	6.1%	4.4%	4.2%	3.7%	0.0%	0.0%
0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
0.0%	0.0%	0.0%	2.3%	2.7%	4.2%	-11.4%	0.8%	0.8%
0.0%	0.0%	0.0%	85.2%	4.4%	4.2%	3.7%	0.0%	0.0%
0.00	0.00	0.00	1.18	1.22	1.26	1.20	1.14	1.14

FY25 - October 2024 Submission
IRN No.: 012030
Type of School: Brick and Mortar
Contract Term: 06/30/2029

Additional Metrics

Management Fee per Pupil
 Salary and Wages per Pupil
 Salary, Wages, and Management Fee per Pupil
 Avg Staff Salary
 Benefits per Pupil
 Number of Students per Instruction Staff
 Number of Students per Total Staff

Receipts per Pupil
 Disbursements per Pupil

Operating Surplus/Deficit per Pupil

Nonoperating Receipts per Pupil
 Nonoperating Disbursements per Pupil
Nonoperating Surplus/Deficit per Pupil

Total Surplus/Deficit per Pupil

Assumptions Narrative Summary

Miscellaneous Notes:

The School does not use a management company.
 The School Sponsor is the Cleveland Metropolitan School District (CMSD). The contracted base fee is 2% of State Foundation revenues.
 Treasurer: Doug Mangen

Expenditure/Expenses/Enrollment

FY25 Enrollment
 State Foundation Payment / FTE
 Forecasted Average Enrollment Growth
 Forecasted Expense Inflation

NEAR WEST INTERGENERATIONAL SCHOOL
 Statement of Receipt, Disbursements, and Changes in Fund Cash Balances
 For the Fiscal Years Ended 2022 through 2024, Actual and
 the Fiscal Years Ending 2025 through 2029, Forecasted

-	-	-	-	-	-	-	-	-
5,900	6,494	7,044	9,975	9,648	9,536	9,295	9,391	
5,900	6,494	7,044	9,975	9,648	9,536	9,295	9,391	
42,013	39,233	44,129	59,327	59,920	61,730	62,372	63,020	
1,404	1,597	2,390	2,488	2,406	2,332	2,272	2,295	
10	9	9	8	8	9	9	9	
7	6	6	6	6	6	7	7	
12,254	11,437	16,091	15,518	15,264	15,263	13,043	13,148	
11,212	14,978	14,073	18,437	17,699	17,379	16,988	17,213	
1,042	(3,541)	2,019	(2,919)	(2,435)	(2,117)	(3,945)	(4,065)	
3,412	6,724	1,842	3,215	3,215	3,215	3,215	3,215	
-	28	-	-	-	-	-	-	
3,412	6,695	1,842	3,215	3,215	3,215	3,215	3,215	
4,454	3,154	3,861	297	780	1,099	(730)	(849)	

Principle Retirement	Interest Expense	Ending Year Balance	Debitor/Creditor
\$ -	\$ -	\$ -	
\$ -	\$ -	\$ -	
\$ -	\$ -	\$ -	
\$ -	\$ -	\$ -	
\$ -	\$ -	\$ -	
\$ -	\$ -	\$ -	
\$ -	\$ -	\$ -	
\$ -	\$ -	\$ -	
\$ -	\$ -	\$ -	

Inc / Dec	Justification
6%	Enrollment based on current and projected student counts
\$10,397	Based on the most recent available State Foundation Report
4%	The School will maintain its current class offerings through the timeframe at a maximum of 255 FTE
2%	The forecast uses 2% as an estimate for inflation

FY25 - October 2024 Submission
IRN No.: 012030
Type of School: Brick and Mortar
Contract Term: 06/30/2029

NEAR WEST INTERGENERATIONAL SCHOOL
 Statement of Receipt, Disbursements, and Changes in Fund Cash Balances
 For the Fiscal Years Ended 2022 through 2024, Actual and
 the Fiscal Years Ending 2025 through 2029, Forecasted

Forecast Salaries & Wages	1%	Staff and compensation planning results in an average 1% annual increase in wages
Purchased Services		
FY25 Rent	\$35,000	Rent based on Current Lease Agreement with CMSD
FY25 Utilities	\$43,268	Utilities based on Current Lease Agreement with CMSD.
Other Facility Costs	\$203,622	Other Facilities Costs based on Lease Agreement with CMSD for Janitorial Services and other estimated expenses.
Insurance	\$19,881	Insurance based on FY24 coverage and increased for inflation
Management Fee	\$0	No Management company
Sponsor Fee	\$67,039	Base rate based on current contract agreement
Audit Fee	\$11,153	Audit based on FY24 expenses paid
FY25 Food Service	\$100,000	Food services expenses based on FY24 expenses paid and estimated expenses
FY25 Transportation	\$41,500	Includes Field Trip Transportation
FY25 Legal	\$7,000	Legal expenses based on FY24 expenses paid and estimated expenses
FY25 Marketing	\$1,600	Paid and estimated expenses for community outreach and recruitment efforts
FY25 Consulting	\$152,863	Includes vendors for services including but not limited to School Improvement, Substitute Teacher Services, Professional Development, Treasurer and Accounting services. Consulting expenses based on FY24 expenses paid and estimated

FY25 - October 2024 Update
IRN No.: 133215
Type of School: Brick and Mortar
Contract Term: 6/30/2025

THE INTERGENERATIONAL SCHOOL								
Statement of Receipt, Disbursements, and Changes in Fund Cash Balances For the Fiscal Years Ended 2022 through 2024, Actual and the Fiscal Years Ending 2025 through 2029, Forecasted								
			Forecast					
Fiscal Year FY22	Fiscal Year FY23	Fiscal Year FY24	Fiscal Year FY25	Fiscal Year FY26	Fiscal Year FY27	Fiscal Year FY28	Fiscal Year FY29	
Operating Receipts								
State Foundation Payments (3110, 3211)	2,130,826	1,752,191	2,297,888	2,763,300	2,901,024	2,926,210	2,951,647	2,977,339
Charges for Services (1500)	-	-	-	-	-	-	-	-
Fees (1600, 1700)	5,566	-	-	-	-	-	-	-
Other (1830, 1840, 1850, 1860, 1870, 1890, 3190)	305,716	631,552	989,065	1,419,499	459,396	459,396	459,396	459,396
Total Operating Receipts	2,442,109	2,383,743	3,286,953	4,182,799	3,360,420	3,385,606	3,411,043	3,436,735
Operating Disbursements								
100 Salaries and Wages	1,400,942	1,535,735	1,551,563	2,144,936	2,228,879	2,250,453	2,272,243	2,294,250
200 Employee Retirement and Insurance Benefits	353,912	370,423	485,797	537,112	542,483	547,908	553,387	558,921
400 Purchased Services	946,560	970,487	1,189,423	2,002,617	1,379,450	1,405,542	1,432,156	1,459,303
500 Supplies and Materials	213,366	151,988	148,925	176,861	195,398	199,306	203,292	207,358
600 Capital Outlay -New	-	-	-	-	-	-	-	-
700 Capital Outlay - Replacement	-	-	-	-	-	-	-	-
800 Other	43,709	147,819	52,309	45,258	46,163	47,086	48,028	48,989
819 Other Debt	-	-	-	-	-	-	-	-
Total Operating Disbursements	2,958,489	3,176,452	3,428,017	4,906,784	4,392,374	4,450,296	4,509,107	4,568,821
Excess of Operating Receipts Over (Under)								
Operating Disbursements	(516,381)	(792,709)	(141,064)	(723,985)	(1,031,954)	(1,064,691)	(1,098,064)	(1,132,086)
Nonoperating Receipts/(Disbursements)								
Federal Grants (all 4000 except fund 532)	865,111	1,302,704	564,811	177,111	184,340	184,340	184,340	184,340
State Grants (3200, except 3211)	2,534	-	-	-	-	-	-	-
Restricted Grants (3219, Community School Facilities Grant)	-	-	-	-	-	-	-	-
Donations (1820)	7,392	10,269	-	-	-	-	-	-
Interest Income (1400)	605	48,500	-	201,786	210,022	210,022	210,022	210,022
Debt Proceeds (1900)	-	-	-	-	-	-	-	-
Debt Principal Retirement	(31,945)	(37,954)	-	-	-	-	-	-
Interest and Fiscal Charges	(42,897)	(41,496)	-	-	-	-	-	-
Transfers - In	-	-	-	-	-	-	-	-
Transfers - Out	-	-	-	-	-	-	-	-
Total Nonoperating Revenues/(Expenses)	800,800	1,282,023	564,811	378,897	394,362	394,362	394,362	394,362
Excess of Operating and Nonoperating Receipts Over/(Under) Operating and Nonoperating Disbursements	284,419	489,314	423,747	(345,088)	(637,592)	(670,328)	(703,701)	(737,724)
Fund Cash Balance Beginning of Fiscal Year	1,233,225	1,517,644	2,006,958	4,485,339	4,140,251	3,502,659	2,832,331	2,128,629
Fund Cash Balance End of Fiscal Year	1,517,644	2,006,958	2,430,705	4,140,251	3,502,659	2,832,331	2,128,629	1,390,905

FY25 - October 2024 Update
IRN No.: 133215
Type of School: Brick and Mortar
Contract Term: 6/30/2025

THE INTERGENERATIONAL SCHOOL
 Statement of Receipt, Disbursements, and Changes in Fund Cash Balances
 For the Fiscal Years Ended 2022 through 2024, Actual and
 the Fiscal Years Ending 2025 through 2029, Forecasted

Staffing/Enrollment

Total Student FTE	258	232	210	245	255	255	255	255
Instructional Staff	23	25	22	22	24	24	24	24
Administrative Staff	11	14	11	11	12	12	12	12
Other Staff	-	-	-	-	-	-	-	-

Purchased Services

Rent	173,951	-	74,842	294,842	74,842	74,842	74,842	74,842
Utilities	46,765	63,926	56,327	94,650	65,000	66,300	67,626	68,979
Other Facility Costs	228,854	242,953	258,581	334,435	292,014	297,854	303,811	309,888
Insurance	-	-	-	-	-	-	-	-
Insurance (USAS code of 851 - incl in Other)	13,672	22,200	45,542	26,508	27,038	27,579	28,131	28,693
Management Fee	-	-	-	-	-	-	-	-
Sponsor Fee	53,989	51,764	56,530	68,826	70,203	71,607	73,039	74,499
Audit Fees	-	-	-	-	-	-	-	-
Audit Fees (USAS code of 843 - incl in Other)	10,115	11,474	11,476	10,000	10,200	10,404	10,612	10,824
Contingency	-	-	-	-	-	-	-	-
Transportation	-	1,940	7,805	92,250	59,415	60,603	61,815	63,052
Legal	8,801	26,783	9,842	22,000	7,500	7,650	7,803	7,959
Marketing	18,324	19,363	20,788	76,832	29,650	30,243	30,848	31,465
Consulting	161,797	189,159	247,522	43,950	1,071	1,092	1,114	1,137
Salaries and Wages	-	-	-	-	-	-	-	-
Employee Benefits	-	-	-	-	-	-	-	-
Special Education Services	95,451	115,886	74,452	293,000	203,460	207,529	211,680	215,913
Technology Services	93,952	82,611	62,784	163,725	154,480	157,569	160,720	163,935
Food Services	45,499	152,176	139,704	140,000	142,800	145,656	148,569	151,541
Other	-	-	-	-	-	-	-	-
Total Purchased Services	951,170	980,234	1,066,195	1,504,743	1,137,672	1,158,929	1,180,611	1,202,726

Financial Metrics

Expenditures per FTE	11,464	13,682	16,324	20,028	17,225	17,452	17,683	17,917
Debt Service Payments	42,897	41,496	-	-	-	-	-	-
Debt Service Coverage	0.25	1.42	0.00	0.00	0.00	0.00	0.00	0.00
Growth in Enrollment	0.0%	-10.0%	-9.5%	16.7%	4.1%	0.0%	0.0%	0.0%
Growth in New Capital Outlay	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Growth in Operating Receipts	0.0%	-2.4%	37.9%	27.3%	-19.7%	0.7%	0.8%	0.8%
Growth in Non-Operating Receipts/Expenses	0.0%	60.1%	-55.9%	-32.9%	4.1%	0.0%	0.0%	0.0%
Days of Cash	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

FY25 - October 2024 Update
IRN No.: 133215
Type of School: Brick and Mortar
Contract Term: 6/30/2025

THE INTERGENERATIONAL SCHOOL
 Statement of Receipt, Disbursements, and Changes in Fund Cash Balances
 For the Fiscal Years Ended 2022 through 2024, Actual and
 the Fiscal Years Ending 2025 through 2029, Forecasted

Additional Metrics

Management Fee per Pupil
 Salary and Wages per Pupil
 Salary, Wages, and Management Fee per Pupil
 Avg Staff Salary
 Benefits per Pupil
 Number of Students per Instruction Staff
 Number of Students per Total Staff

-	-	-	-	-	-	-	-	-
5,429	6,615	7,388	8,755	8,741	8,825	8,911	8,997	8,997
5,429	6,615	7,388	8,755	8,741	8,825	8,911	8,997	8,997
41,204	39,378	47,017	64,998	61,913	62,513	63,118	63,729	63,729
1,371	1,596	2,313	2,192	2,127	2,149	2,170	2,192	2,192
11	9	10	11	11	11	11	11	11
8	6	6	7	7	7	7	7	7
9,463	10,268	15,652	17,073	13,178	13,277	13,377	13,477	13,477
11,464	13,682	16,324	20,028	17,225	17,452	17,683	17,917	17,917
(2,001)	(3,414)	(672)	(2,955)	(4,047)	(4,175)	(4,306)	(4,440)	(4,440)
3,393	5,864	2,690	1,547	1,547	1,547	1,547	1,547	1,547
290	342	-	-	-	-	-	-	-
3,103	5,522	2,690	1,547	1,547	1,547	1,547	1,547	1,547
1,102	2,108	2,018	(1,409)	(2,500)	(2,629)	(2,760)	(2,893)	(2,893)

Receipts per Pupil
 Disbursements per Pupil

Operating Surplus/Deficit per Pupil

Nonoperating Receipts per Pupil
 Nonoperating Disbursements per Pupil

Nonoperating Surplus/Deficit per Pupil

Total Surplus/Deficit per Pupil

Assumptions Narrative Summary

Fiscal Year 2025-2029 Projected Debt					
Description	Beginning Year Balance	Principle Retirement	Interest Expense	Ending Year Balance	Debitor/Creditor
FTE Review	\$ -	\$ -	\$ -	\$ -	
Loan A	\$ 892,382.77	\$ 203,638.33	\$ 170,570.27	\$ 691,795.00	Erie Bank
Loan B	\$ -	\$ -	\$ -	\$ -	
Line of Credit	\$ -	\$ -	\$ -	\$ -	
Notes, Bonds	\$ -	\$ -	\$ -	\$ -	
Capital Leases	\$ -	\$ -	\$ -	\$ -	
Payables (Past Due 180+ days)	\$ -	\$ -	\$ -	\$ -	
Total	\$ 892,382.77	\$ 203,638.33	\$ 170,570.27	\$ 691,795.00	

Miscellaneous Notes:

The School does not use a management company.
 The School Sponsor is the Educational Services Center of Lake Erie West. The contracted base fee is 2.5% of State Foundation revenues.
 The School received a loan to purchase its building through Erie Bank. The loan terms are \$1,000,000 principal, 4.27% interest rate, 20-yr amortization.
 Treasurer: Doug Mangen

Expenditure/Expenses/Enrollment

	Inc / Dec	Justification
FY25 Enrollment	17%	Enrollment based on current and projected student counts.
State Foundation Payment / FTE	\$10,936	Based on the most recent available State Foundation Report
Forecasted Average Enrollment Growth	4%	The School will maintain its current class offerings through the timeframe at a maximum of 255 FTE
Forecasted Expense Inflation	2%	The forecast uses 2% as an estimate for inflation
Forecast Salaries & Wages	1%	Staff and compensation planning results in an average 1% annual increase in wages
Purchased Services		
FY25 Rent	\$0	The School owns its building
FY25 Utilities	\$94,650	Utilities based on prior year and estimated expenses

FY25 - October 2024 Update
IRN No.: 133215
Type of School: Brick and Mortar
Contract Term: 6/30/2025

THE INTERGENERATIONAL SCHOOL
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 For the Fiscal Years Ended 2022 through 2024, Actual and
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Other Facility Costs Insurance Management Fee Sponsor Fee Audit Fee FY25 Food Service FY25 Transportation FY25 Legal FY25 Marketing FY25 Consulting	\$245,111 \$26,508 \$0 \$68,826 \$10,000 \$140,000 \$92,250 \$22,000 \$39,800 \$188,060	Other Facilities Costs based on prior year and estimated expenses Insurance based on current coverage and estimated expenses No Management company Base rate based on current contract agreement Audit based on FY24 expenses paid Food services expenses based on FY24 expenses paid and estimated expenses Includes Field Trip Transportation Legal expenses based on FY24 expenses paid and estimated expenses Paid and estimated expenses for community outreach and recruitment efforts Includes vendors for services including but not limited to School Improvement, Substitute Teacher Services, Professional Development, Treasurer and Accounting services. Consulting expenses based on FY24 expenses paid and estimated
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Coversheet

Long Term Projections Gap Analysis

Section: IV. Finance
Item: D. Long Term Projections Gap Analysis
Purpose: Discuss
Submitted by:
Related Material: IGS Funding Gap Analysis - October (002).pdf

Intergenerational Schools

Funding Gap Analysis & Long-Term Financial Modeling

Guiding Question

Given the increase in charter school funding in Ohio and the availability of High Quality Community School funding - what is the gap between funding and necessary expenditures to run the Intergenerational model?

Note: A variety of modeling was done but we felt these three models summarized our findings succinctly.

Key Assumptions

Enrollment

Total network budgeted enrollment increases by 39 by FY29

TIS:

FY25 Budget: 245

FY25 Actual: 231

FY29 Budget: 255

NWIS:

FY25 Budget: 226

FY25 Actual: 216

FY29 Budget: 255

Revenue

High-Quality Funding:

NWIS receives funding through FY27.

TIS receives funding only in FY25.

HQ Totals:

NWIS - \$570,000/yr

TIS - \$600,000/yr

Levy:

NWIS receives funding. TIS does not.

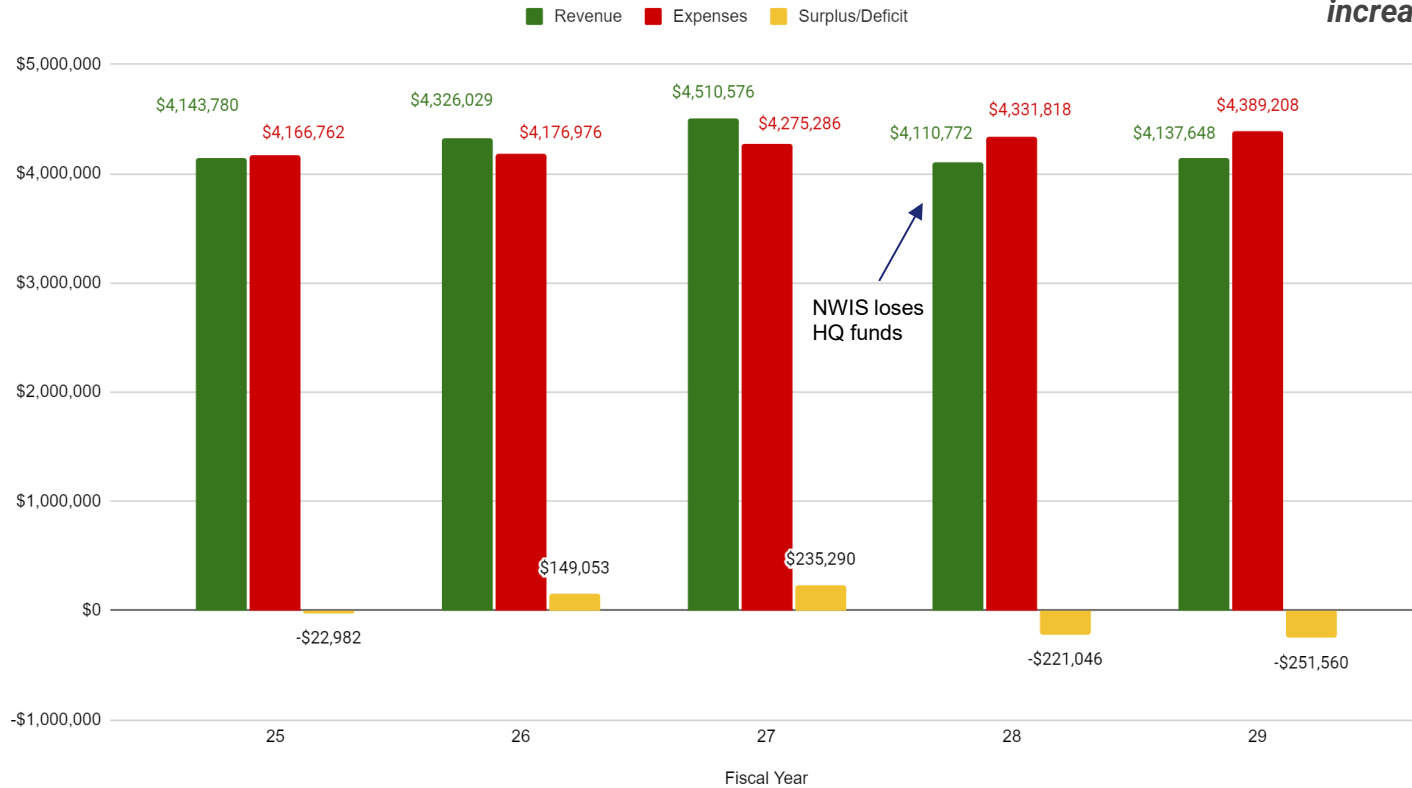
Expenditures

Continue Strategic Investments

- Curriculum specialists
- Counselors
- Building Subs
- IG program staff
- Increased consulting and coaching
- Staff compensation

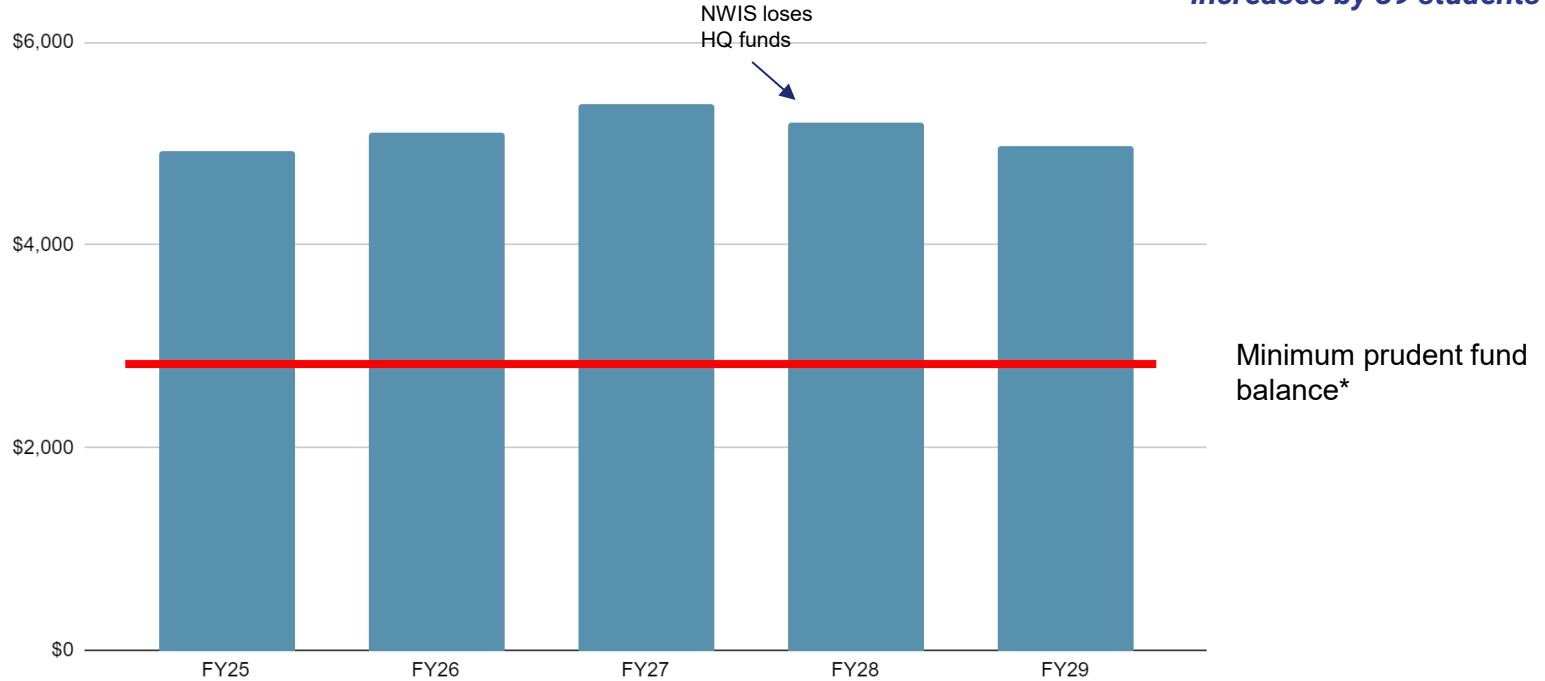
Current Assumptions – NWIS loses HQ in FY28, enrollment increases by 39 students

NWIS Projected without IGC Facilities Support



Current Assumptions – NWIS loses HQ in FY28, enrollment increases by 39 students

NWIS Cash Reserves in Thousands



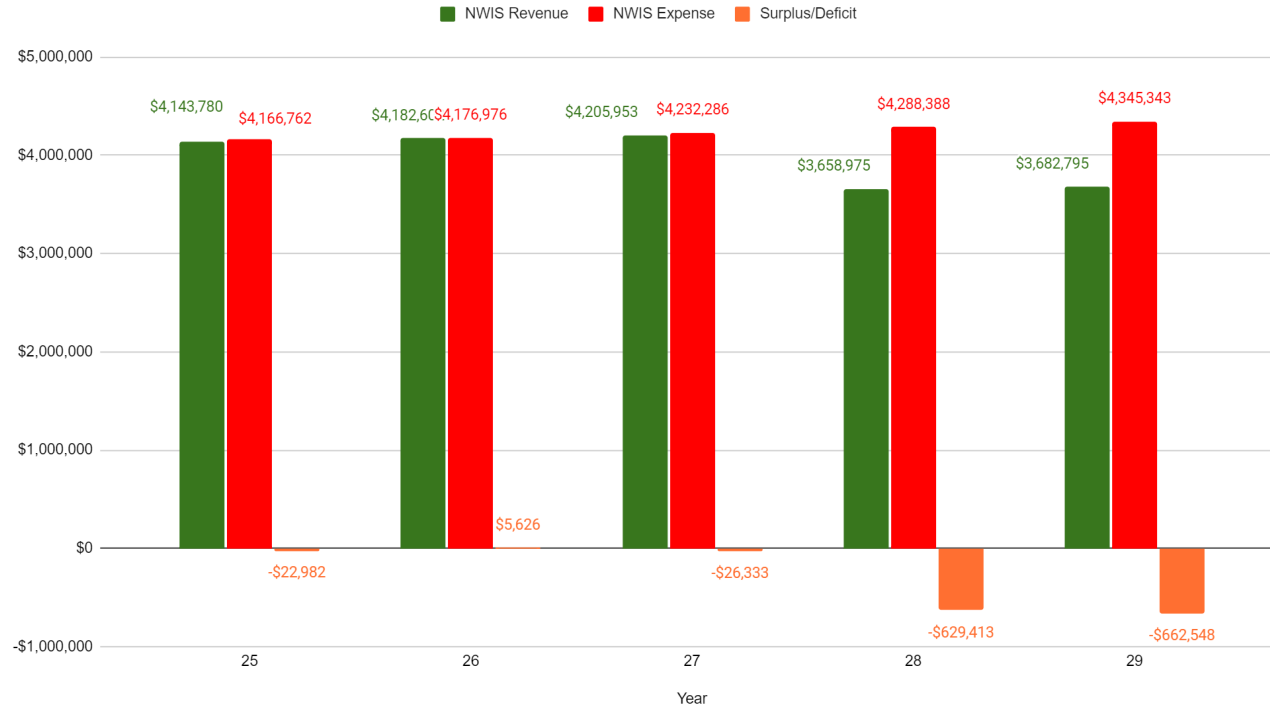
NWIS Reserves

NWIS reserves stay flat at \$4,900,000 through FY29.

*Prudent fund balance is approximately 7 months of expenditures or \$2,300,000.

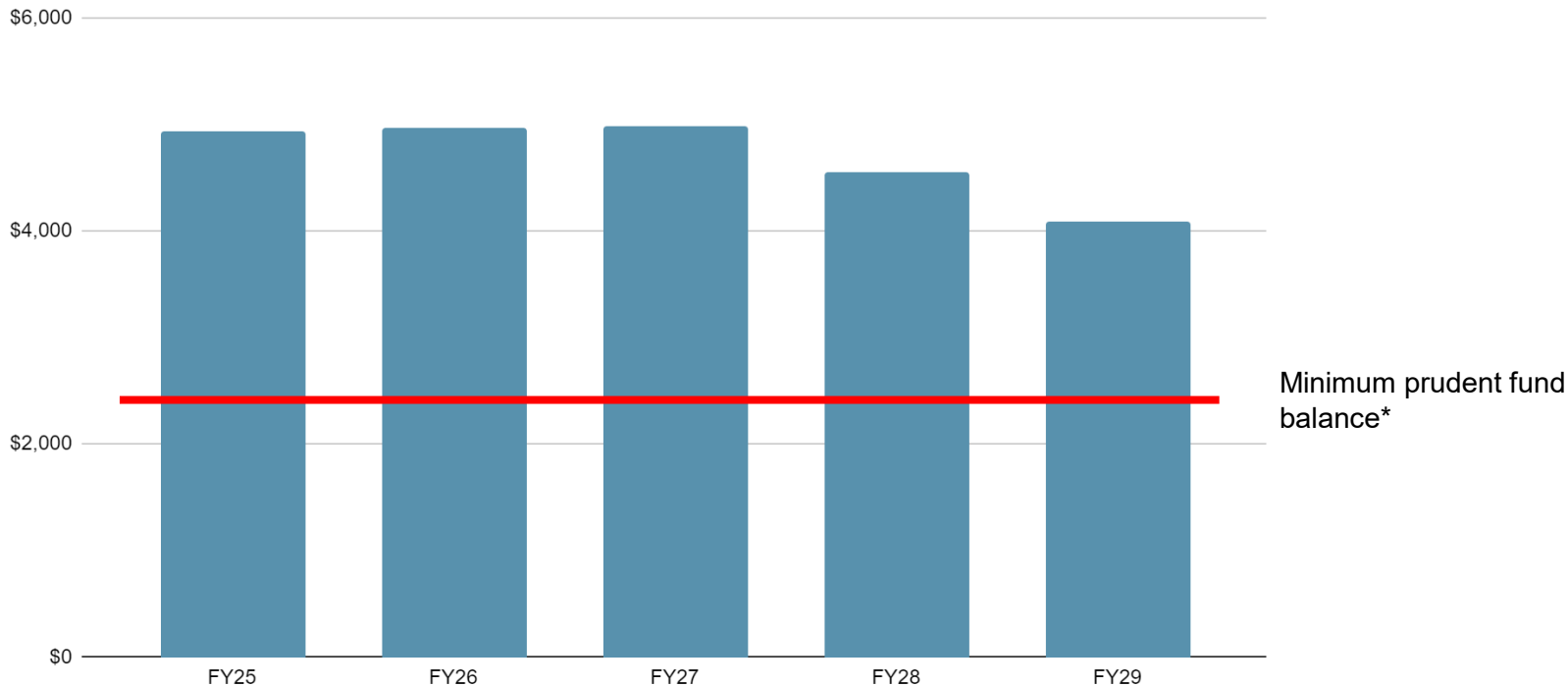
Worst Case Assumptions – NWIS loses HQ in FY28, budgeted enrollment remains flat at 226

NWIS Worst Case Scenario Revenue and Expenses



Current Assumptions – NWIS loses HQ in FY28, enrollment increases by 39 students

NWIS Worst Case Reserves - in Thousands



NWIS Reserves

In a worst case scenario, NWIS reserves fall by \$900,000 in FY29.

*Prudent fund balance is approximately 7 months of expenditures or \$2,300,000.

NWIS – Big Takeaways

- NWIS HQ funding is critical to the long-term success of the school in its current academic configuration regardless of reaching enrollment capacity in FY29.
- Reaching enrollment capacity matters. Without HQ funding, NWIS's deficit increases by \$400,000 each year.
- Strong cash reserves provides NWIS a strong foundation to weather fiscal uncertainty in its short-term future: including potential facility costs.

Key Assumptions

Enrollment

Total network budgeted enrollment increases by 39 by FY29

TIS:

FY25 Budget: 245

FY25 Actual: 231

FY29 Budget: 255

NWIS:

FY25 Budget: 226

FY25 Actual: 216

FY29 Budget: 255

Revenue

High-Quality Funding:

NWIS receives funding through FY27.

TIS receives funding only in FY25.

HQ Totals:

NWIS - \$570,000/yr

TIS - \$600,000/yr

Levy:

NWIS receives funding. TIS does not.

Expenditures

Continue Strategic Investments

- Curriculum specialists
- Counselors
- Building Subs
- IG program staff
- Increased consulting and coaching
- Staff compensation

TIS Projected without IGC Facilities Support

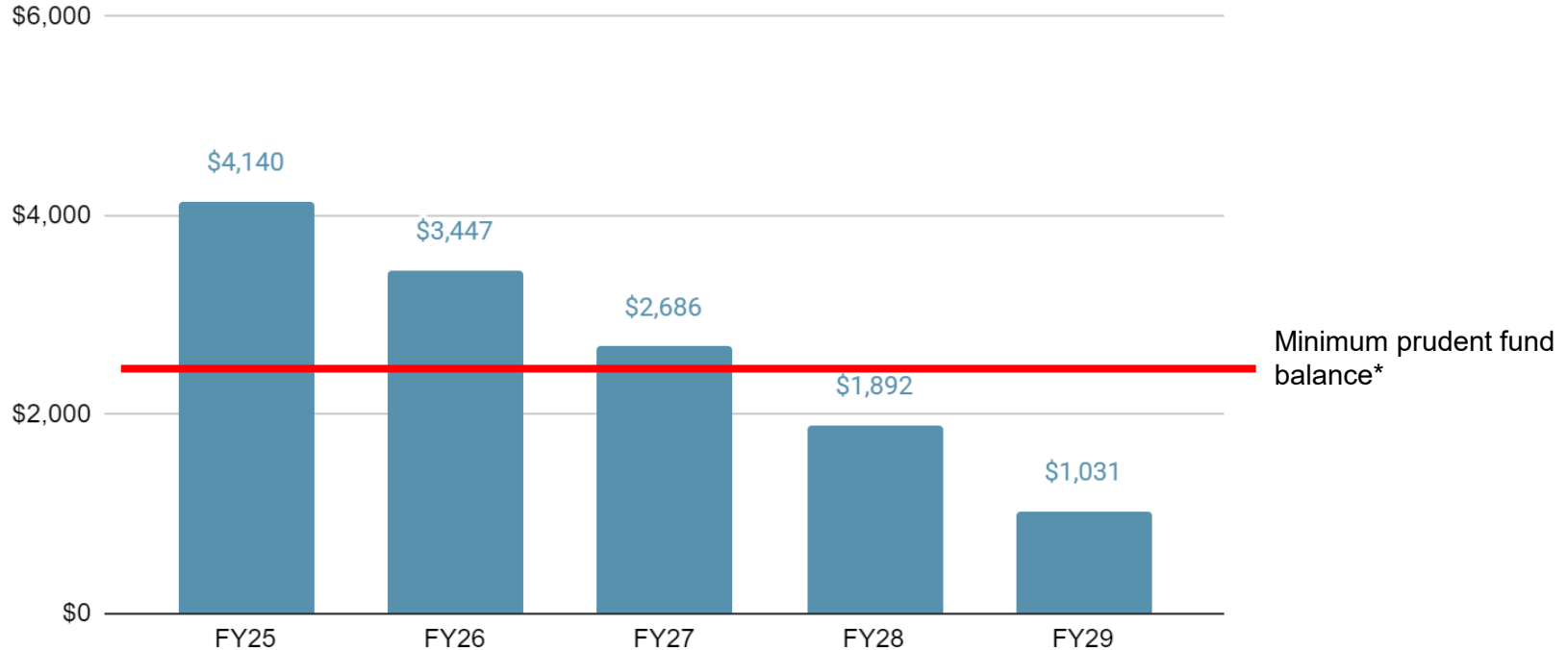
Current Assumptions – TIS loses HQ in FY26, enrollment increases by 10 students by FY26 to 255



**Deficit lowlights - Facility costs, no levy funding and no HQ.
FY25 expenses do not include LIS merger costs.**

Current Assumptions – TIS loses HQ in FY26, enrollment increases by 10 students by FY26 to 255

TIS Cash Reserves in Thousands



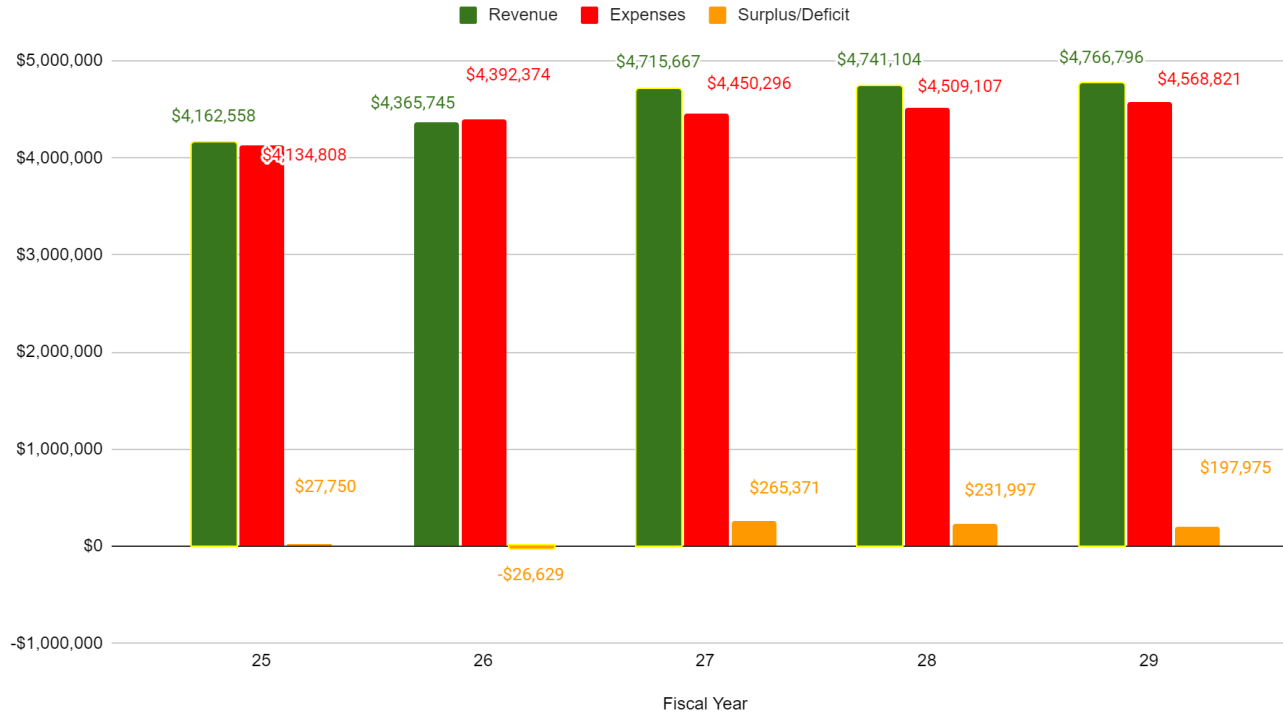
TIS Reserves

TIS reserves fall after losing HQ funding in FY26 and action by school leaders is necessary in FY28 to maintain the prudent fund balance.

*Prudent fund balance is approximately 7 months of expenditures or \$2,300,000.

Best Case Assumptions – TIS retains HQ, regains levy funding, enrollment increases by 10 students by FY26 to 255

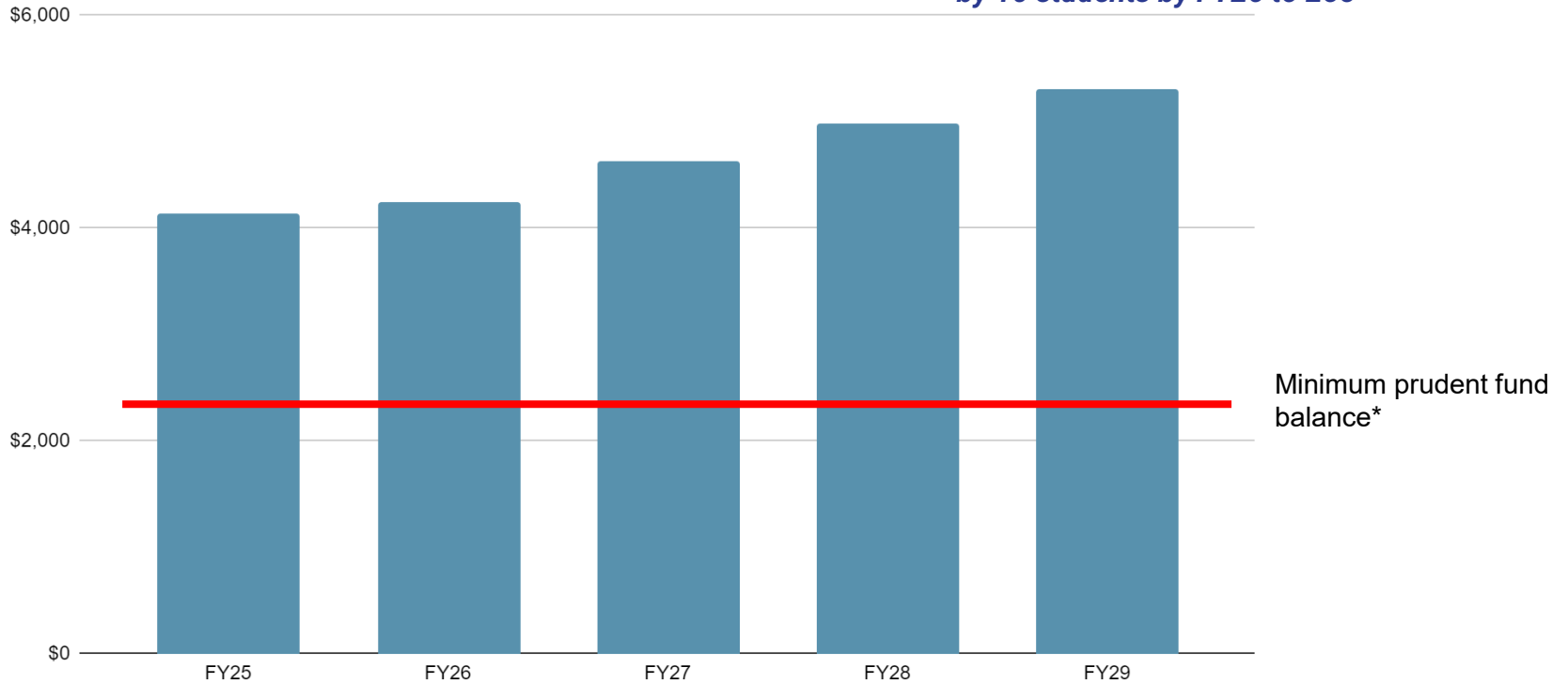
TIS Projected Best Case Scenario without IGC facilities support



Note – No LIS expenses are included in FY25 and levy funding beginning in FY27 causes a slight deficit in FY26.

Best Case Assumptions – TIS retains HQ, regains levy funding enrollment increases by 10 students by FY26 to 255

Best Case Scenario - TIS Cash Reserves in Thousands



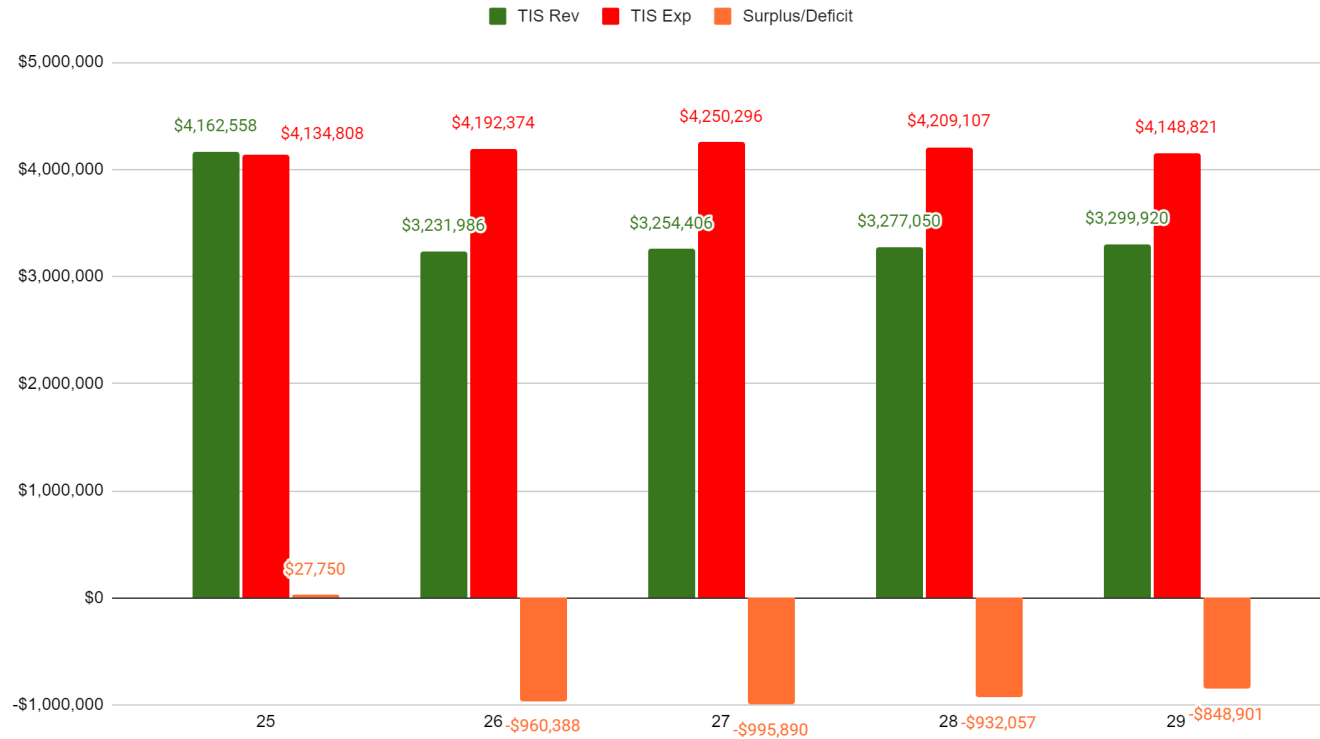
TIS Reserves

TIS reserves remain strong and increase with continued HQ funding and the reintroduction of CMSD levy funds.

*Prudent fund balance is approximately 7 months of expense. Powered by BoardOnTrack.

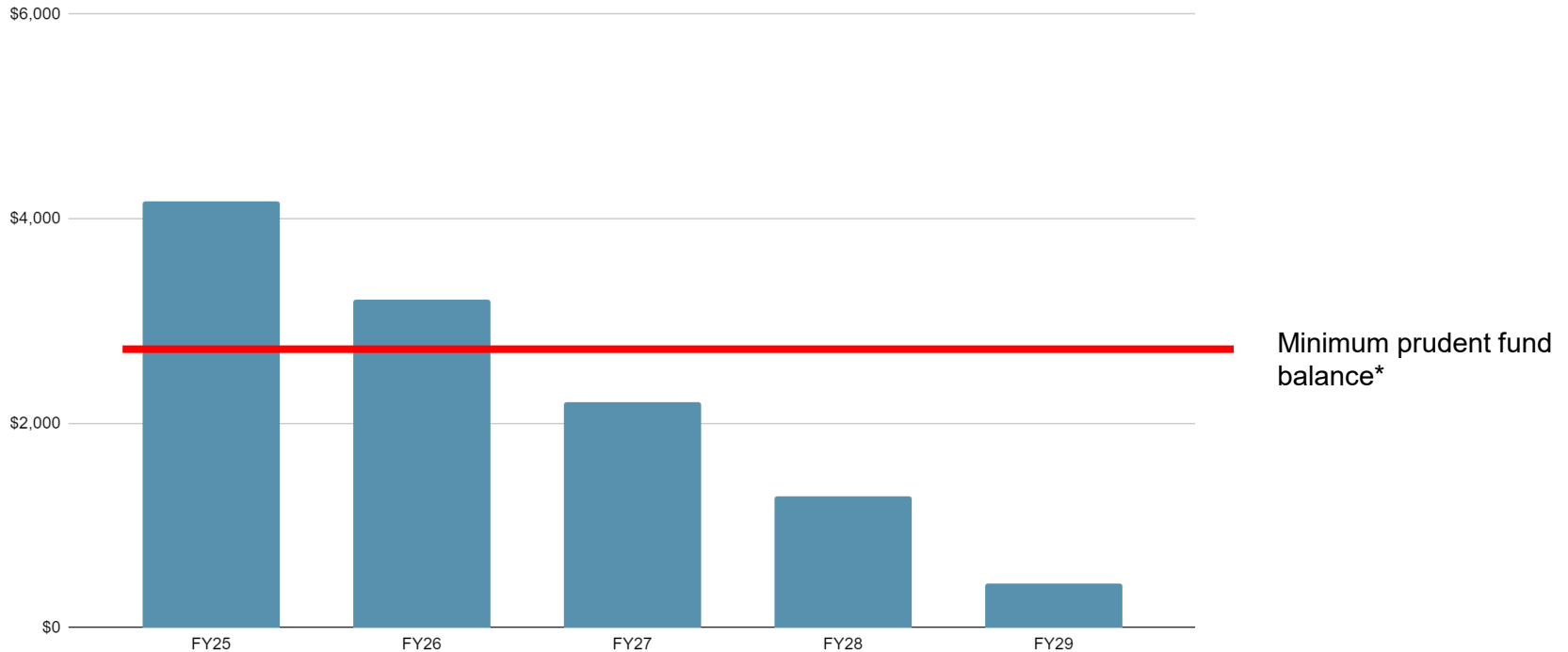
Worst Case Assumptions – TIS loses HQ, enrollment remains flat at 227 students.

TIS Worst Case Scenario - Without IGC Facilities Support



Worst Case Assumptions – TIS faces large deficits without IGC, HQ and levy revenue. Additionally, enrollment remains flat.

TIS Worst Case Scenario - Cash Reserves in Thousands



TIS Reserves

TIS reserves fall after losing HQ funding and flat enrollment and action by school leaders is necessary in FY27 to maintain the prudent fund balance.

*Prudent fund balance is approximately 7 months of expenditures or \$2,800,000

TIS – Big Takeaways

- TIS HQ funding is critical to the long-term success of the school in its current academic configuration regardless of reaching enrollment capacity in FY29.
- Due to TIS owning its renovated building it faces larger facility costs each year increasing expenses.
- Reaching enrollment capacity matters. Without HQ funding, TIS's deficit increases by \$200,000 each year.
- Even under the worst-case scenario TIS has reserves meeting the minimum prudent amount.

Coversheet

Contracts and MOUs

Section: V. Consent Agenda
Item: B. Contracts and MOUs
Purpose: Vote
Submitted by:
Related Material: NEW-Diversity Center of NEO.docx
NEW-BrandPivot.pdf
NEW-K.Funk Consults Proposal for IGs SY24-25 Compliance Support.pdf
NEW-Clarity Couch.pdf
NEW-Earl Ingram Lunch Monitor.pdf
NEW-Ohio Connections-T1.pdf
NEW-Ohio Connections-T2.pdf
NEW-FIT Technologies.pdf
REVISED-D&N Transportation.pdf



Contract and Service Agreement

This “Agreement” is entered into by the Diversity Center of Northeast Ohio located at 3659 Green Road, Suite 220, Cleveland, OH 44122 (“DCNEO”) and the Near West Intergenerational School (“Client” and collectively with DCNEO, the “Parties”) is effective as of September 5th, 2024 (the “Effective Date”). The Parties agree as follows:

1. **SCHEDULE 1.** The attached Schedule 1, including the defined terms set forth therein, is an integral part of this Agreement.
2. **ENGAGEMENT.** Client hereby engages and retains DCNEO to serve as consultant and service provider in connection with instructional design and delivery of the Services to the Participants.
3. **TERM.** The term of the Agreement will begin on the Effective Date and end on the earlier of: (a) the last date on which the Services have been delivered; or (b) the first anniversary of the Effective Date.
4. **DCNEO’s OBLIGATIONS.** DCNEO will:
 - a. Determine, with the assistance of the Client Contact, specific areas of instruction and organization of instruction and Program materials, as well as the scope of the Services.
 - b. Design of all agreed upon Services to meet the needs and objectives of Client with respect to the Program.
 - c. Production of all necessary Program materials and Program supplies.
 - d. Delivery of agreed-upon programming by appropriately trained and skilled Facilitator(s).
5. **CLIENT’S OBLIGATIONS.** The Client will participate and cooperate as follows:
 - a. Provide DCNEO with a signed copy of this Contract and Service Agreement
 - b. Work with the DCNEO Contact to determine specific areas of instruction and organization of instruction and Program materials as well as the scope of the Services and Client’s budget relating to the foregoing.

- c. Pay the Fee and Expenses within 30 days following receipt of invoice submitted to Client by DCNEO, including any invoice for advance deposits of the Fee or the Expenses (if applicable), as such Fee and Expenses are set forth in each invoice, and subject to the terms of this Agreement.
- d. Schedule mutually agreeable planning dates, times, and schedule changes with DCNEO in a respectable timeframe.
- e. For any student programming that encompasses a full grade level, clients are required to schedule and host a parent/family/guardian information session in advance of the first program. The purpose of these sessions is to be transparent about the curriculum that students will participate in as a part of the programs. Additionally, it affords parents the opportunity to ask specific questions about programs in advance of their facilitation. In the event that this information night is not conducted before the first student program session, the session will need to be rescheduled to after the information night is conducted.
- f. Reserve space, acceptable to DCNEO, for all Participants participating in each Program.
- g. For any public facing community forums or task force events, the client will provide on-site security for the protection of all attendees.
- h. Notify DCNEO if Client is unable to provide a fully working laptop, projector or other AV equipment needed for the Program.
- i. Appropriately market the Program using marketing materials approved in advance, in writing, by DCNEO.
- j. Assign Participants to groups or arrange for sign-up for all Participants participating in the Program.
- k. Use Program materials, activities and outlines only for the Participants at the time(s) the Program is being presented by DCNEO. Client hereby acknowledges and agrees that such Program materials, activities, and outlines, as well as the intellectual property related thereto, remain the property of DCNEO, and that any other usage thereof must be approved, in DCNEO's sole discretion, in writing, in advance by DCNEO.
- l. Confirm to DCNEO that the Client has a signed media release form on file for each participant, authorizing DCNEO to use the likeness and voice of each participant on DCNEO's website, social media pages and printed materials (and will furnish a copy of such signed release forms to DCNEO upon the latter's request).

- m. In the event that due to inclement weather or other unforeseen circumstances in which scheduled contracted programming needs to be canceled, an agreed upon make-up day will be rescheduled during the same contracted calendar school year.

6. **MUTUAL OBLIGATIONS.** The Parties will:

- a. Confer upon and mutually determine the content of any announcements regarding the Program, its contents, objectives, or results.
- b. Promptly inform each other of any issues or problems that arise during the development and implementation of the Services.
- c. Grant permission to each other, upon reasonable request, to share information regarding the Services with other potential clients and organizations affiliated or in discussion with the requesting party, consistent with the confidential provisions of the Family Educational Rights Privacy Act.
- d. The program and all materials are confidential and proprietary property of DCNEO and cannot be reproduced without permission.
- e. In light of the COVID-19 pandemic, either party has the right to transition a scheduled in-person program to an online format. Notice must be provided at least 5 business days prior to making the switch.
- f. If a program takes place in-person, the Diversity Center of Northeast Ohio is responsible for ensuring that the program facilitator(s) follow all safety measures required by the State of Ohio, the Centers for Disease Control and Prevention, and the host venue. Similarly, Near West Intergenerational School is responsible for ensuring that participants follow all safety measures required by the State of Ohio, the Centers for Disease Control and Prevention, and the host venue.

This Agreement may be signed in multiple counterparts each of which will be deemed an original, and all of which, when taken together, will constitute one document; and may be delivered by facsimile or other electronic means

The Diversity Center of Northeast Ohio – “DCNEO”

By: 

Melodie Gonzales
Engagement Manager

Date: 9/5/2024

Near West Intergenerational School - "CLIENT"

By: Brooke A. King

NAME: Brooke King

Date: 9/6/24

THIS SCHEDULE 1 IS AN INTEGRAL PART OF THIS AGREEMENT.

1. Program(s)/workshop(s) title (the “Program”):

Bias and Micro Messages

2. Description of services to be provided by DCNEO (the “Services”) as part of the Program:

Bias & Micro Messages (4 Hours)

This foundational workshop serves as a starting point for diversity and inclusion programming. It explores the phenomena of unconscious bias and how professionals can minimize its effects on colleague and student relations. Participants will learn how their own unique identities shape their experiences and impact their day-to-day interactions with others. They will learn strategies for minimizing the effects of unconscious bias, which can manifest in the form of verbal, non-verbal, and environmental micro-messages.

Participants will examine the role they play in communicating micro-messages both interpersonally and organizationally and build skills that will aid them in addressing micro-inequities when they occur. Participants will gain greater confidence in their ability to communicate value and have a positive impact through micro-affirmations, as well as other skills that will aid them in creating an inclusive space where everyone is respected, valued, and appreciated.

3. Description of the participants participating in the Program and the maximum number (if applicable) of such participants (the “Participants”):

50 Participants MAX

4. Date(s), time(s), and locations(s) that the Services are scheduled to be delivered:

November 11, 2024 – Part 1 (2 hours)

January 6, 2025 – Part 2 (2 hours)

5. The facilitator(s), including the maximum number of facilitators (if applicable), who will facilitate or conduct the Program and deliver the Services (the “Facilitator(s)”):

DCNEO Staff

6. The total amount that Client is responsible for paying DCNEO hereunder for DCNEO's Services and the Program(s), is \$2,200 (the "Fees"). Client acknowledges that DCNEO incurs costs and expenses in connection with its Services and in reliance on this Agreement even prior to the actual commencement of the program(s) hereunder. Accordingly, Client agrees to the payment schedule ("Payment Schedule") based on the following payment terms and conditions:
- a. Client will pay DCNEO a non-refundable advance deposit equal to 10% of the total Fees upon execution of this Agreement; and
 - b. Client will pay DCNEO an amount equal to 40% of the Fees no later than the first day of DCNEO's provision of the programming hereunder; and
 - c. Client will pay DCNEO the remaining balance of the total Fees within three (3) business days after the final day of the programming.
 - d. In the event that Client cancels or terminates this Agreement for any reason other than a material breach by DCNEO, regardless of whether the actual programming expected to be provided by DCNEO has commenced and notwithstanding the payment schedule set forth in this Section 6, Client shall pay DCNEO the entire Fee and any related expenses incurred by DCNEO no later than thirty (30) days from the date on which Client cancels or otherwise terminates this Agreement.
7. DCNEO principal contact person (the "DCNEO Contact") and contact information:
Melodie Gonzales – mgonzales@diversitycenterneo.org
8. Client principal contact person (the "Client Contact") and contact information:
April Maimone - amaimone@nearwestschool.org



Statement of Work

September 6, 2024

Intergenerational Schools
Brooke King
Executive Director
bking@tisonline.org

Dear Brooke,

Enclosed is a statement of work and agreement covering the communications and design support for Intergenerational Schools.

Please sign off on any components you are ready to proceed with and contact me with any questions.

As always, it is a pleasure to work with you!

Thanks,

Reanna Karousis
reanna@brandpivotinc.com

BrandPivot

WHY BRANDPIVOT?

Every day, we help clients like you forge the brand strategies that help them flourish. Our growing team of designers, writers, programmers and strategists represent decades of experience and accessible expertise—driven by results, not ego. As a boutique creative studio with a portfolio of long-term and repeat clients, we value collaborative relationships rooted in trust.

Statement of Work

Initial below to approve	Item	Deliverables	Cost
	Family + Staff Handbooks and Office templates	Brand fonts + colors set for both books with Word, Excel and PowerPoint templates configured and installation instructions for IT to deploy across the team.	\$1,000
	Brand Guide Revision	Guide revision to reflect updated network/school information.	\$500-\$750
	Annual Report	Includes design, PDFs for review, 2 sets of revisions and final files for production.	\$2,000
	Strategic Plan Summary (Design only)	All content provided; design only. (For one or two-page document.)	\$250
	Strategic Plan Summary (option 2)	To include writing/editing support and design.	\$500-\$750
	Shirt Designs	Two designs: board t-shirt and staff sweatshirt. Does not include production/shirt costs.	\$250

Production timeline and prioritization of each deliverable to be determined. Any impact on cost estimates will be elevated for pre-approval before proceeding as stated in the terms below.

BrandPivot

Mailing Address: 19525 Hilliard Blvd, #16588 / Rocky River, Ohio 44116 • P: 216.400.8004
brandpivotinc.com

About this Statement of Work

This Statement of Work is based on immediate acceptance and job specifications as of this date and may be inappropriate if specifications change. While variations, if any, from estimated total cost normally do not exceed plus/minus 15%, client changes in scope, objectives, or quantities, as well as supplier price changes will affect this estimate's accuracy. When cost exceeds 15% of original quote, BrandPivot will re-estimate job if scope of job changes. Estimate does not include outside expenses unless noted. Additional expenses (e.g., stock photos) will be estimated, approved and billed separately if needed.

Right to Authorship Credit

Both Parties agree that when asked, Client must properly identify Agency as the creator of the deliverables. Client does not have a proactive duty to display Agency's name together with the deliverables, but Client may not seek to mislead others that the deliverables were created by anyone other than the Agency.

Agency reserves the right to display all aspects of creative work, including work in progress and completed projects in Agency's portfolio, in articles on websites and in other promotional materials. Agency will not publish any confidential or non-public work without Client's prior written consent.

Terms

- 40% deposit upon contract execution
- 30% upon presentation of draft deliverables
- 30% upon delivery of final deliverables

Brooke King, Intergenerational Schools Date

Darcy Zehe, BrandPivot Date

BrandPivot

Mailing Address: 19525 Hilliard Blvd, #16588 / Rocky River, Ohio 44116 • P: 216.400.8004
brandpivotinc.com



K.Funk Consultants, LLC

Empowering educators to inspire students.

kfunkconsultants@gmail.com

+1 740 202 1819

Proposal

August 30, 2024

Mrs. Brooke King

I would like to share my interest in continued work with the Intergenerational Schools and you in support of compliance and school leadership. As we discussed, there is a need for advocacy on behalf of our students and needs as a school with sound backing and I would like to help navigate some of that decision making and/or equip the team with the materials and information relevant.

Proposed Work

Direct Support to Leadership (Principals and/or Director)

- Bi-weekly standing check-in calls with Director
 - Upcoming deadlines + data to consider
 - Proactively planning for future adjustments
 - Solution seeking problems in practice
- Check in calls with principals as needed
- Research, communication and navigation of compliance and leadership

Budget

This work will be invoiced at the end of each quarter on a by hour basis at \$55 per hour. It is anticipated that this work will take an average of 2 hours per week for 35 weeks. At maximum, a total of 70 hours of work is expected and **is not to exceed \$3,850.**

A handwritten signature in black ink that reads 'K. Funk'.

Kristal Funk, M.Ed

Educational Leader ÷ Instructional Coach



**Consultation Agreement
between The Clarity Couch and
The Intergenerational Schools**

Event / Course Title:	On-Site Counseling Services
Dates:	9/25/2024 3:15-4:15pm 10/1/2024 9am-2pm 10/9/2024 9am-2pm 10/17/2024 9am-2pm 10/25/2024 9am-2pm 10/28/2024 9am-2pm
Location:	In-person (TBD)
Class Format:	One introduction to services Five days of 1-1 on-site therapy services
Sessions #:	6
Consultant's Name:	The Clarity Couch Counseling Services
Address:	12600 Rockside Rd Ste 172
City, State, Zip:	Garfield Heights, Ohio 44125
Telephone:	216-245-8249
Contact Name:	Aziz Ahmad and Brianna McElrath
TERMS & CONDITIONS	
Speaking Fee (Honorarium):	\$200/Hr.
Audiovisual Equipment:	<ul style="list-style-type: none"> If The Clarity Couch requires any AV equipment, they provide notification at least two weeks in advance.
Speaker's Personal Belongings:	The Clarity Couch will be responsible for their personal belongings during the event.
Lecture Materials and Printing:	N/A
Copyright Clause:	N/A
ADA Clause:	The Clarity Couch agrees to work with The Intergenerational Schools to meet the needs of any attendees indicating a requirement for special seating, lighting, and/or materials due to visual, auditory, or other impairments by provisions outlined within the Americans with Disabilities Act.
Cancellation Clause:	If The Intergenerational Schools cancel the event: <ul style="list-style-type: none"> Cancellation up to 30 days before class – no charge for consultation fee.



TERMS & CONDITIONS		
	<ul style="list-style-type: none"> • Cancellation between one to three weeks before class – 50% of consultation fee. • Cancellation in the last week before class – 75% of consultation fee. <p>If The Clarity Couch cancels:</p> <ul style="list-style-type: none"> • 100% of any monies paid to or expenses paid for the consultation will be refunded to the Chapter within five business days. 	
ACCEPTANCE		
x	x	x
<i>Signature</i> The Intergenerational Schools	Phone #	Date
x	x	x
<i>Signature</i> (Angela Banks), CEO The Clarity Couch	Phone # 216-904-6729	Date



Independent Contractor Agreement

THIS AGREEMENT entered into this date, **9/16/2024** by and between The Intergenerational School (TIS) hereinafter called TIS and Earl Ingram, hereinafter called “the Monitor”.

WITNESSETH

WHEREAS, TIS requires the service of an independent, qualified **Recess and Lunch Monitor** to manage said programs

and,

WHEREAS, **Earl Ingram** are deemed qualified to perform in this capacity and is interested in doing so.

NOW, THEREFORE, THE PARTIES AGREE TO AS FOLLOWS:

I. TERM

TIS shall engage **the Monitor** in the capacity set forth from **9/16/2024** until either party wishes to terminate this Independent Contractor agreement at any time with 10 business day notice.

II. PAYMENT

The **monitors** shall receive \$ **20.27/hr.**

III. RESPONSIBILITY OF PARTIES

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

IV. The Monitors' RESPONSIBILITY

JOB'S PRIMARY DUTIES AND RESPONSIBILITIES

- Supervise students during recess and lunch breaks from 10:30am – 11:30am and from 12:00pm – 1:00pm during instructional days.
- Ensure student safety by actively monitoring activities and addressing any inappropriate behavior.
- Assist students with seating arrangements, getting lunch, and maintaining a clean eating environment.
- Foster a respectful, inclusive, and enjoyable atmosphere during play and meal times.

TIS • 11327 Shaker Boulevard, Suite 200 E • Cleveland, Ohio 44104 • P 216.721.0120 • F 216.721.0126 • www.TISonline.org
NWIS • 3805 Terrett Avenue • Cleveland, Ohio 44113 • P 216.961.4308 • F 216.961.4606 • www.NearWestSchool.org
LIS • 18025 Marcella Road • Cleveland, Ohio 44119 • P 216.586.3872 • www.tisonline.com/lakeshore-intergenerational-school.org



- Communicate with teachers and school staff regarding any concerns or incidents.
- Uphold school policies and safety protocols.

This engagement is contingent upon the **Monitor** obtaining and providing to TIS the results of a satisfactory current BCI/FBI background check, a Student Monitoring Permit and any other licensure or materials requested by TIS. Any expenses related to the foregoing shall be at the sole cost and expense of the **Monitor**.

V. TIS'S RESPONSIBILITY

- Provide an additional staff member who will assist with groups that are more than 2 homeroom classes at a time or as needed as needed.
- Support in upholding school policies and safety protocols.

VI. INDEPENDENT CONTRACTOR STATUS

The status of the **Monitor** shall be that of the independent contractor and the Independent Contractor shall not be considered an employee of the TIS and shall not be entitled to receive any fringe benefits associated with regular employment and shall not be subject to the provisions of TIS. The **Monitor** shall be responsible for payment of all federal, state, and local taxes associated with compensation received pursuant to this Agreement. TIS in no way controls, directs, or has any direct responsibility for the actions of the **Monitor** 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 **Monitor** 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 **Monitor** shall indemnify, defend, and hold harmless TIS, 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 **Monitor**, their agents, employees, or anyone acting under **the Monitor's** direction, control, or on **the Monitor'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.

Contractor Signature:

Earl Ingram

Earl W. Ingram S.S.D

Date: 09 / 19 / 2024





APPROVED BY TIS:

BROOKE KING, EXECUTIVE DIRECTOR

Date_____

Title	Lunch Monitor Contract (Autosaved)
File name	Lunch Monitor Contract (Autosaved).doc
Document ID	9789256d93fce8434a86fb14a1b35f6e57d6cde4
Audit trail date format	MM / DD / YYYY
Status	● Pending signature

Document History

 SENT	09 / 19 / 2024 21:09:35 UTC	Sent for signature to Earl Ingram (e Ingram@bgcneo.org) and Brooke King (bking@tisonline.org) from aahmad@tisonline.org IP: 204.11.188.127
 VIEWED	09 / 20 / 2024 01:21:20 UTC	Viewed by Earl Ingram (e Ingram@bgcneo.org) IP: 96.29.195.47
 SIGNED	09 / 20 / 2024 01:24:44 UTC	Signed by Earl Ingram (e Ingram@bgcneo.org) IP: 96.29.195.47
 INCOMPLETE	09 / 20 / 2024 01:24:44 UTC	This document has not been fully executed by all signers.

School Transportation Agreement

1. Parties Involved

School District/School: The Intergenerational School

Address: 11327 Shaker Blvd, Cleveland, OH 44104

Transportation Provider: The Ohio Connection

Address: 1811 Brookpark Rd, Cleveland, OH 44109

2. Scope of Services

The transportation provider will be responsible for:

1. Transporting Students:

- From Lakeshore Intergenerational School (LIS) to The Intergenerational School (TIS) at 7:15 AM, Monday through Friday during scheduled school days. With a return trip at 3:00pm from The Intergenerational School (TIS) to Lakeshore Intergenerational School (LIS). The bus can be parked at the school overnight during the week only. It will need to be kept at The Ohio Connection over weekends, holidays and school breaks.

2. Monitoring:

- The school will arrange for a person to be onsite who will monitor the students' arrival and departure to and from Lakeshore Intergenerational School and The Intergenerational School.

3. Payment Terms

- \$300 per day for transportation between Lakeshore Intergenerational School (LIS) and The Intergenerational school (TIS) and back.

The total agreed upon price is as follows:

This covers 43 instructional days. the total cost to \$12,900.

From September 3rd, 2024 until November 8th, 2024 with intent to renew for subsequent trimesters.

The payment terms are as follows: Ohio Connection will invoice monthly with detailed dates.

4. Signatures

Frank King

The Intergenerational School Superintendent

Date: 08 / 30 / 2024

Peter Bandi

The Ohio Connection

Date: 08 / 30 / 2024

Title	TIS- Ohio Connection Transportation Agreement First...
File name	School_Transporta...rst_Trimester.pdf
Document ID	642ba02a46408f985f72315671249660dac91ddb
Audit trail date format	MM / DD / YYYY
Status	● Signed

Document History



SENT

08 / 30 / 2024

16:13:40 UTC

Sent for signature to Brooke King (bking@tisonline.org) and Peter Ohio Connection (office@ohconnection.com) from cdewerth@igschools.org
IP: 76.188.169.221



VIEWED

08 / 30 / 2024

16:19:29 UTC

Viewed by Brooke King (bking@tisonline.org)
IP: 204.110.222.161



SIGNED

08 / 30 / 2024

16:19:52 UTC

Signed by Brooke King (bking@tisonline.org)
IP: 204.110.222.24



VIEWED

08 / 30 / 2024

19:03:51 UTC

Viewed by Peter Ohio Connection (office@ohconnection.com)
IP: 75.209.112.23



SIGNED

08 / 30 / 2024

19:05:23 UTC

Signed by Peter Ohio Connection (office@ohconnection.com)
IP: 75.209.112.23



COMPLETED

08 / 30 / 2024

19:05:23 UTC

The document has been completed.

Second Trimester School Transportation Agreement

1. Parties Involved

School District/School: The Intergenerational School

Address: 11327 Shaker Blvd, Cleveland, OH 44104

Transportation Provider: The Ohio Connection

Address: 1811 Brookpark Rd, Cleveland, OH 44109

2. Scope of Services

The transportation provider will be responsible for:

1. Transporting Students: From Lakeshore Intergenerational School (LIS) to The Intergenerational School (TIS) at 7:15 AM, Monday through Friday during scheduled school days. With a return trip at 3:00pm from The Intergenerational School (TIS) to Lakeshore Intergenerational School (LIS). The bus can be parked at the school overnight during the week only. It will need to be kept at The Ohio Connection over weekends, holidays and school breaks.

2. Monitoring: - The school will arrange for a person to be onsite who will monitor the students' arrival and departure to and from Lakeshore Intergenerational School and The Intergenerational School.

3. Payment Terms

- \$300 per day for transportation between Lakeshore Intergenerational School (LIS) and The Intergenerational school (TIS) and back. Payment Terms are Net 30

The total agreed upon price is as follows:

This covers 50 instructional days. the total cost to \$15,000.

From November 12th, 2024 until February 13th, 2025 with intent to renew for subsequent trimester.

The payment terms are as follows: Ohio Connection will invoice monthly with detailed dates.

4. Signatures

The Intergenerational School Superintendent

Date: _____

The Ohio Connection

Date: _____

Statement of Work

Intergenerational Schools – LIS to TIS – Equipment Move – 2024

Oct 14, 2024



Remit To Address:

Intergenerational Schools
11327 Shaker Boulevard
Cleveland, OH 44104

Engagement Executive:

Fred Franks
CSO
ffranks@FITtechnologies.com

Client Contact:

Brooke King
Executive Director
(216) 961-4308
bking@igschools.org

Client Services Coordinator:

Adam Crowley
adam.crowley@fittechnologies.com



Overview

Intergenerational Schools has requested FIT Technologies move some IT equipment from Lakeshore Intergenerational School (LIS) to The Intergenerational School (TIS). LIS recently closed, and the equipment being moved will be utilized at the TIS location.

Lakeshore Intergenerational School (LIS) address:

- 18025 Marcella Rd, Cleveland, OH 44119

The Intergenerational School (TIS) address:

- 11327 Shaker Blvd Ste. 200 E, Cleveland, OH 44104



Project Deliverables

FIT Technologies will schedule a day to move the following equipment from LIS to TIS. FIT Technologies will provide two field technicians for an 8 hour day to ensure all equipment is delivered to TIS at the agreed upon location on the 4th floor. A moving truck with a lift gate will be required to move this equipment and is included in the cost of this project.

- Equipment to be moved:
 - Three (3) Mimio Boxlite Interactive Boards
 - FIT will confirm connectivity of these boards upon delivery to TIS
 - Ten (10) Chromebook Carts
 - Approximately 100 Chromebooks
- Project Management



Pricing

Description	Cost
Technical Support Services Labor	\$2,088.00
Project Management Labor	\$440.00
Lift Gate Truck Rental	\$310.00
Projector Credit	(\$300.00)
Total Cost:	\$2,538.00



Assumptions

- FIT has a key card to access the LIS and TIS buildings.
- Intergenerational Schools will provide the location to deliver and store equipment within the TIS building.
- If FIT needs to utilize the lift inside the LIS building on the Neff Road side, Intergenerational Schools will notify the landlord of this need.
- Chromebook provisioning or reenrollment is not included in this project.
- Quantity of Chromebooks to be moved are approximately 100, but may be slightly less, as the school has occasionally been moving some from LIS to TIS.
- All Chromebook carts will be delivered to the agreed upon location at TIS and movement to specific classrooms will be handled separately through tickets, outside of this project.
- Changes or additions to the definition, scope, or coverage areas in this statement of work may require a separate agreement and pricing.



Start Date + Term of Service

The start date for this Statement of Work will be agreed upon after the execution of this agreement.

The statement of work is valid for 30 days from the date the Agreement was sent. If the agreement is signed after 30 days, it may result in project start delays and/or price changes.



Invoicing & Payment Terms

FIT Technologies will invoice Intergenerational Schools for labor and truck rental fees (\$2,538.00) upon the completion of the project. Intergenerational Schools will be billed for credit card processing fees if incurred. All payments are due within 30 days of receipt of the invoice.



Terms + Conditions

This Agreement is subject to FIT's Standard Terms and Conditions. To the extent there is any conflict between the terms of this Agreement and the Standard Terms and Conditions, the terms of this Agreement shall govern.

If the organization is tax exempt, a copy of the tax exemption certificate must accompany this signed agreement.

Is the organization tax exempt? Yes No



Acceptance

The terms included in this agreement are approved.

Intergenerational Schools

FIT Technologies

Brooke King

Adam Tubbs

Oct 15, 2024

Oct 14, 2024

Intergenerational Schools
Brooke King
Executive Director

FIT Technologies
Adam Tubbs
CEO

Signature Certificate

Reference number: R5WXA-AWS2E-XTALQ-EFSNY

Signer

Timestamp

Signature

Adam Tubbs

Email: adtubbs@fittechnologies.com

Sent: 14 Oct 2024 19:52:13 UTC
Viewed: 14 Oct 2024 20:14:35 UTC
Signed: 14 Oct 2024 20:14:54 UTC



Recipient Verification:

✓ Email verified 14 Oct 2024 20:14:35 UTC

IP address: 174.207.103.91
Location: Cleveland, United States

Brooke King

Email: bking@igschools.org

Sent: 14 Oct 2024 19:52:13 UTC
Viewed: 15 Oct 2024 15:12:57 UTC
Signed: 15 Oct 2024 15:13:29 UTC



Recipient Verification:

✓ Email verified 15 Oct 2024 15:12:57 UTC

IP address: 174.207.101.51
Location: Cleveland, United States

Document completed by all parties on:

15 Oct 2024 15:13:29 UTC

Page 1 of 1



Signed with PandaDoc

PandaDoc is a document workflow and certified eSignature solution trusted by 50,000+ companies worldwide.



School Transportation Agreement

1. Parties Involved

School District/School: The Intergenerational School

Address: 11327 Shaker Blvd, Cleveland, OH 44104

School District/School: Lakeshore Intergenerational School

Address: 18025 Marcella Rd, Cleveland, OH 44119

Transportation Provider: D&N Reliable Transportation LLC

Address: 2400 Orange Ave, Cleveland, OH 44101

2. Scope of Services

The transportation provider will be responsible for:

1. Transporting Students:

- From students' residences to The Intergenerational School (TIS) at 7:15 AM, Monday through Friday during scheduled school days.
- From The Intergenerational School (TIS) to students' residences at 3:00 PM, Monday through Friday during scheduled school days.

2. Monitoring:

- There will be a monitor at Lakeshore Intergenerational School to monitor kids before departure and upon arrival.

3. Payment Terms

The total agreed upon price is as follows:

- \$125 per day for transportation from students' residences to The Intergenerational School (TIS) and back. This covers 161 instructional days.
- A charge of \$200 per day for 10 days.
- A charge of \$160 per day for 4 days.

- A charge of \$80 per day for monitoring for 155 instructional days.

This brings the total cost to \$35,165.

The payment terms are as follows:

- 50% of the total amount is due upon the start of the contract on August 20, 2024.

- The remaining 50% is due on February 1, 2024.

4. Signatures

_____  _____

The Intergenerational School Superintendent D&N Reliable Transportation LLC

Date: _____

Date: 9/6/2024

Coversheet

New & Annual Policy Renewal

Section: V. Consent Agenda
Item: C. New & Annual Policy Renewal
Purpose: Vote
Submitted by:
Related Material: Academic Prevention and Intervention (1).pdf
2024 SpEd Policies (1).pdf
Enrollment Policy 2024.pdf
Accommodating Religious Beliefs.pdf
Prohibition Against Affirming Specific Beliefs.pdf

Approved: _____



THE Intergenerational S C H O O L S

ACADEMIC PREVENTION AND INTERVENTION POLICY

ASSESSMENTS

Each Intergenerational School shall assess student achievement and needs in all program areas in compliance with state and federal law, including all rules adopted by the State Board of Education and each school's Community School Sponsor Contract. The purpose of these assessments will be to determine the progress of students and to assist in attaining student performance objectives and educational achievement goals of the School.

STATE-REQUIRED TESTS

Each Intergenerational School shall administer all State-mandated tests to students at the times designated by the State Board of Education. For purposes of this policy, "achievement tests" for purposes of this Policy, are defined as those aligned with the Ohio academic content standards and model curriculum, designed to measure a student's level of skill in a specific subject area that is expected at the end of a designated grade and/or is required as part of the Ohio graduation requirement. For purposes of this Policy, "diagnostic assessments" include those assessments aligned with Ohio academic content standards and model curriculum, designed to measure student comprehension of academic content and mastery of related skills for a relevant subject area at each grade level, kindergarten through three. Each Intergenerational School will administer diagnostic assessments as required by Ohio law or regulation or as may be necessary to identify students who may not attain necessary academic standards.

All statewide tests shall be administered in accordance with all rules issued by the Ohio Department of Education and/or Ohio Board of Education. In addition to achievement tests and diagnostic assessments, staff members will assess the academic achievement and learning needs of each student. Procedures for such assessments may include, by illustration but not limitation, teacher observation techniques, cumulative student records, and/or student performance data collected through standard testing programs.

Any student receiving special education services may be excused from taking any particular test required if the individualized education program ("IEP") developed for the student excuses the student from taking that test and instead specifies that an alternative assessment method be used. The Alternative Assessment for a Student with Disability ("AASWD") is approved by the Department of Education to evaluate the performance of students with the most significant cognitive disabilities for whom regular assessments, even when accommodations are not appropriate. In general, the IEP shall not excuse the student from taking a test unless no reasonable accommodation can be made to enable the student to take the test. In that case, each school shall use AASWD to test students needing an alternate form of assessment.

Each Intergenerational School shall not use any student's failure to attain a specified score on any State mandated test as a factor in any decision to deny the student promotion to a higher-grade level, except as provided by law.

Approved: _____

INTERVENTION SERVICES

In accordance with this Policy, each Intergenerational School shall provide prevention/intervention services in pertinent subject areas to students who score below the proficient level on a reading, writing, mathematics, or science achievement test and/or who do not demonstrate academic performance at their grade level based on the results of a diagnostic assessment. Intervention services will be commensurate with the student's test performance in each such test area including prevention, intervention, or remediation. Such prevention, intervention or remediation programs may include, by way of illustration, remedial program content, one-on-one teacher/student interaction, computer-assisted remedial course material, student specific tutoring intervention and/or small group interaction. During the school year following the year in which the tests prescribed by the Ohio Revised Code are administered to any student, the School shall provide appropriate intervention services, commensurate with the student's test performance, including any intensive prevention, intervention, or remediation as required by state or federal law in any skill in which the student failed to demonstrate at least a score of proficient level on an achievement test.

For each student required to be offered intervention services, the School may involve the student's parent or guardian and classroom teacher in developing the intervention strategy and shall offer to the parent or guardian the opportunity to be involved in the intervention services.

THIRD GRADE READING GUARANTEE

To the extent required by law and applicable to each Intergenerational School, the School shall administer the required achievement tests, perform remediation, and retain students.

PROCEDURES FOR THE REGULAR COLLECTION OF STUDENT PERFORMANCE DATA

Each Intergenerational School shall develop procedures for the regular collection of student performance data; a plan for the design of classroom-based intervention services to meet the instructional needs of individual students as determined by the results of diagnostic assessments; and procedures for using student performance data to evaluate the effectiveness of intervention services and, if necessary, to modify such services.

The School shall keep records for each student including the following:

- A. A unique State student identification code or a student data verification code as required in accordance with R.C. 3301.0714(D)(2);
- B. A list or designation of which tests are required, and which tests are not required;
- C. A list or designation of which tests, required or not required, are taken and which are not taken at each test administration period;
- D. Score for each test taken;
- E. Whether each student attained the requisite performance standard designated for each required test;
- F. What if any tests must still be taken;
- G. Whether or not intervention must be provided

Approved: _____

No information shall be included on a student's transcript for a test which is not passed. When a student who has taken mandatory tests in a school leaves that school to enroll in another school, the school previously attended shall provide, immediately upon request by a school official from the enrolling school, all applicable records set forth above.

PROCEDURES FOR USING STUDENT PERFORMANCE DATA TO EVALUATE THE EFFECTIVENESS OF INTERVENTION SERVICES AND, IF NECESSARY, TO MODIFY SUCH SERVICES.

Each Intergenerational School shall utilize diagnostic assessments that are nationally-normed and aligned with State- standards to measure student performance data. Data will be collected to determine student performance in reading, math, language arts and science and the effectiveness of intervention services.

Student performance will be measured after each diagnostic assessment and compared with previous assessments to determine gains in each relevant subject category. Intervention and remediation programs may include by way of illustration, one-on-one tutoring, computer-assisted remedial curriculum, small group intervention and/or one-on-one student/teacher interaction will be employed. Subsequent diagnostic assessments will be employed after implementation of intervention and remediation programs to determine efficacy and effectiveness of such programs.



SPECIAL EDUCATION MODEL POLICIES AND PROCEDURES

Adopted on:

October 23, 2024

Date

By:

The Intergenerational School & 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.



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Intergenerational School**
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CLEVELAND, OHIO 44113
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I. About the Intergenerational Schools

The Intergenerational Schools are an award-winning **network of public charter schools** in Cleveland that help children learn at their own pace in a diverse and supportive community environment.

Our schools have **small, multi-age classes** that allow children to learn and teach alongside older adults who serve as learning partners.

The Intergens are public, nonprofit charter schools, which means **any student can attend for free**. Our performance is measured alongside traditional public schools through state testing, but the charter model allows us **the flexibility to innovate**.

Since 2000, we have been challenging the status quo in elementary education, and our approach has been recognized in Cleveland and internationally. Our schools perform well in state tests, our teachers both nurture and model lifelong learning as professional educators, and our learning partnerships enrich our classrooms and neighborhoods. Most importantly, our families feel welcomed and our students thrive in school and beyond.

II. Learning in an Intergenerational School

Multi-age classes allow students to move progressively through the stages of development as they meet the objectives and benchmarks based upon individual student mastery.

Stages of Developmental Learning:

- Emerging (similar to K- 1)
- Beginning (similar to 1 - 2)
- Developing (similar to 3 - 4)
- Refining (similar to 5 - 6)
- Applying (similar to 7-8)

As a public school, students are assigned a grade level and follow curriculums that are aligned to the Ohio Department of Education's standards.

III. Enrollment Requirements

Enrollment in an Intergenerational School is free (no tuition). Applications are accepted for students entering grades K-8. Students entering into Kindergarten

must be five years old before September 30th to attend school without the need for a Kindergarten Assessment. If a student turns five years old between October 1st and December 31st they are eligible to apply, but will need to take a Kindergarten Assessment to determine their readiness to enter school. Enrollment acceptance will be contingent upon the results of the Kindergarten Assessment.

To be eligible for a space at any of the three schools, you must submit the following items:

1. Complete online application at <https://igschools.schoolmint.net/>
2. Child's Birth Certificate (required by the State of Ohio)
3. Proof of Custody if applicable (required by the State of Ohio)
4. Child's most up to date immunization records
5. At least ONE Proof of Residency
 - i. As defined by law (ORC 3314.11), a Proof of Residency must be one of the following:
 - A deed, mortgage, lease, current homeowner's or renter's insurance declaration page, or current real property tax bill;
 - A utility bill or receipt of utility installation issued within 90 days of enrollment;
 - A paycheck or paystub issued to the parent or student within 90 days of the date of enrollment that includes the address of the parent's or student's primary residence;
 - The most current available bank statement issued to the parent or student that includes the address of the parent's or student's primary residence;
 - Documented affirmation of address of student's

- parent(s) from district of residence where parent(s) currently resides;
- Notarized affirmation from parent(s) or student(s) if over 18-years of age of current residence address; • USPS return receipt from certified letter sent to parent(s) by district of residence;
 - Written confirmation from the Department of Job and Family Services of current address of the parent(s); or
 - Written confirmation from a local law enforcement agency of the current address of the parent(s).
 - a mortgage or lease,
- ii. If you and your student(s) are currently not residing in a home that you own or rent (such as temporary residence with a friend or family member), you may:
- iii. provide a notarized affidavit from the owner or renter of the property that states you are residing with them along with a proof of residence with that individual's name on it.
 - iv. If this is not possible, please contact the Enrollment Specialist at who will help you fill out an alternate form.

Attendance at a Parent Information Session is recommended for new families, to ensure you are making an informed decision about your child's education and this unique model. Please visit www.igschools.org/enroll to sign up for the session.

Current students are required to submit a new application (re-enroll) each year to reserve their space for the following school year. Failure to re-enroll could result in a returning student not having a spot in the following school year.

IV. Enrollment Dates

Early Enrollment is for the following school year. Open enrollment begins on the first Tuesday following Winter Break and will end the second Tuesday of March. Students with complete applications, including all required documents, will be sent offers or placed on a waiting list no later than the second week of March.

Open Enrollment begins when Early Enrollment closes and runs continually through to the beginning of the next Early Enrollment period. Spaces are offered as completed applications, including all required documents, are received.

The Boards of the Intergenerational Schools will review and approve these dates annually.

V. Enrollment Procedures

a. Re-Enrollment of Current Students

Spaces are allotted first to all current students who have a fully completed a Re-Enrollment application:

1. Complete online re-enrollment application at <https://igschools.schoolmint.net/>
2. At least ONE Proof of Residency that is no older than 90 days from the date of the Re-Enrollment Application. Two proofs of residence are encouraged.¹
3. Annual supply fee²
4. Any past due school fees

ALL Re-Enrolling students are guaranteed a space if all of the items of their application are complete by the last day of Early Enrollment

¹ List of acceptable Proof of Residency documents are listed in the Enrollment Requirements section and at www.igschools.org/enroll. A student is not considered fully re-enrolled until a current Proof of Residency is on file.

² The supply fee and school fees are established annually by the Board of Directors. The school provides all school supplies throughout the year. As stated in the Family Handbook, any family for whom this fee poses a financial hardship should contact the Director of Network Operations (salonso@igschools.org) who will set up a payment plan, waive the fee, or take other action to ensure that this does not constitute a barrier to enrollment.

b. New Student Early Enrollment

Early Enrollment begins in January and is for families looking to enroll their child for the start of the following school year. During Early Enrollment, Re-Enrollment applications are accepted from all current students as well as any new student applications.

Based on returning students' anticipated learning stage and math level, the number of available spaces for new applicants at each learning stage and math level will be determined.

New student applications are accepted during the Early Enrollment period; applications completed on the first day and the last day of Early Enrollment have the same chance during this time period; the date of submission is not relevant.

At the close of Early Enrollment, **available spaces are offered only to new students who have a fully completed application (all required items)**. The school reserves the right to determine the number of new student available spaces at any learning stage and math level based on specific instructional needs of current students.

c. Enrollment Prioritization

Available spaces for new applicants are allotted in the following prioritized order until all available spaces at each level are filled:

1. Emerging Stage (Kindergarten) Spaces

- 1) Siblings³ of currently enrolled and returning or graduating siblings
- 2) Children⁴ of full-time employees of the school
- 3) Woodhill Homes residents
- 4) City of Cleveland residents
- 5) Non-Cleveland residents

³ Siblings refer to sisters and brothers, or half-siblings, who reside in the same household. Siblings or half-siblings that reside in different households are not given preference in enrollment.

⁴ As provided per ORC 3314.061 of the Revised Code, enrollment preference may be given to students who are the children of full-time staff members employed by the school, provided the total number of students receiving this preference is less than 5% of the school's total enrollment.

2. Beginning Stage (Grade Equivalent 1 and 2 in order) Spaces

- 1) Siblings* of currently enrolled and returning students
- 2) Siblings* of newly accepted kindergartners
- 3) Children** of full-time employees of the school
- 4) Woodhill Homes residents
- 5) City of Cleveland residents
- 6) Non-Cleveland residents

3. Developing through Applying Stages (Grade Equivalent 3 – 8 in order) Spaces

- 1) Siblings* of currently enrolled and returning students
- 2) Siblings* of newly accepted students
- 3) Children** of full-time school employees
- 4) Woodhill Homes residents
- 5) City of Cleveland residents
- 6) Non-Cleveland residents

d. Early Enrollment Lottery and Wait List Procedures

Lottery

If, at the close of Early Enrollment, there are more completed new student applications at any of the above priority levels than available spaces, a random lottery is used to determine who is offered the available spaces.

If needed, an admission lottery will be held on the date two weeks after the close of Early Enrollment. Lottery numbers are assigned to all completed applications based on learning stage and math level applied for. The parent may request a receipt for the assigned lottery number, if they desire. On the date of the lottery, a board member or designated official will select application numbers in a random order through a designated random number generating process that is in compliance with community school standards.

Each child applicant to a certain learning stage or math level is given a unique lottery number. If the lottery number for a child, who has a sibling applying as well, is drawn and there is a space available at the other sibling(s)'s appropriate learning stage/math level, the other sibling(s) will be offered admission using the sibling preference. If space is not

available at the needed learning stage/math level needed for the other sibling(s), they will be put on the Wait List, taking into account the sibling preference and order position at that level. The sibling(s) and any other students on the wait list will be offered admission at the point in time when the school has an opening at the needed learning stage/math level, according to their position on the Wait List.

Lottery Notification Procedures

In the event of a lottery, parents/guardians are encouraged to attend the lottery but attendance is not mandatory. Parents who do not attend the lottery will be notified of their child's status within five business days of the lottery by phone and by first class mail sent to the address provided on the application. Parents are required to provide written confirmation (on forms included with the lottery notification) of their intent to enroll their child in the school, submit the supply fee, and indicate their agreement to notify their school district of residence of their plans. The necessary forms and a stamped addressed envelope will be provided in the notification mailing. Failure to sign and return these forms within 10 business days of the lottery to The Intergenerational Schools will result in offering the opening to the next student in line, and the original applicant will be placed at the end of the wait list.

Wait List

Once all of the available school spaces have been offered in the order of the lottery picks, the remaining applicants are placed on a learning stage/math level Wait List based on the order of the lottery number picked.

Example:

- #1 non-Cleveland resident
- #2 sibling
- #3 Woodhill Homes residents
- #4 Cleveland resident
- #5 sibling
- #6 non-Cleveland resident

From that order, siblings are moved up to the top of the list, followed by

Cleveland residents/Woodhill Homes residents, who will always move up ahead of any non-Cleveland residents.

Example:

#2 sibling

#4 sibling

#3 Woodhill Homes residents

#4 Cleveland resident

#5 sibling

#6 non-Cleveland resident

Any additions to the Wait List during Open Enrollment will be moved up accordingly if they are 1. a sibling, or 2. a Cleveland resident/Woodhill Homes resident. If an admitted student fails to enroll or show up on the scheduled first day, that vacated spot may be offered to the next student at the appropriate learning stage/math level from the Wait List.

Families will be informed about their child's number placement on the waitlist. This number is subject to change depending on siblings or Cleveland residents/Woodhill Home residents who apply beyond Early Enrollment. Families can request to know their spot(s) on the waitlist at any time.

e. Open Enrollment Procedure

(Begins the first day after the end of Early Enrollment)

During Open Enrollment, spaces are offered on a first come, first served basis to students with a fully completed application and documents. The date of the application may play a role in determining the order with which spaces are offered. The following procedures determine the date of the application:

- **Date of submission:** the date that the application form is received by the school (electronically through School Mint) during Open Enrollment or the date of reactivation.
- **Date of reactivation:** any application received during or before Early Enrollment but not completed as of the last day of early enrollment is considered inactive. The application may be reactivated by the parent/guardian taking any step to complete the application, including contacting the Enrollment Coordinator to request reactivation. The

- application is then re-activated and re-dated.
- **Date of completion:** the date all required application items are received.

Offering and Accepting Available Spaces

Any open spaces that become available during Open Enrollment are filled first from the existing learning stage/math level Wait Lists. After each subsequent information session, any available spaces are offered, or the applicant is added to the existing Wait List based on the date of completion of their application. If there are multiple applicants for a given learning stage/math level whose date of completion is the same, the tie is broken based on date of submission. Spaces are always offered at the Emerging stage first, proceeding up to the Applying Stage. This is done in order in case any sibling preferences arise as younger spaces are filled.

Acceptance for the Following School Year

As soon as the school determines that there is a match between the available space for the following school year, and the learning stage/math level of an applicant, the parent shall be immediately notified by phone at the contact number provided on the Application form and will be emailed a link to an Acceptance of Enrollment letter and Registration packet (series of forms in SchoolMint). The parent will have a 10-day window from e-mailing date of the link to an Acceptance of Enrollment letter and Registration packet (series of forms in SchoolMint) to return the signed Acceptance of Enrollment form and completed Registration packet in SchoolMint. After 10 days, if there is no response, the offer of enrollment is automatically withdrawn and the student goes to the bottom of the wait list.

Acceptance for the Current School Year

If an applicant is interested in a space that becomes available up to 10 days before the first day of school and throughout the current school year, the parent will be notified by phone and will have a 24-hour window to sign the Acceptance of Enrollment letter and complete the Registration packet in SchoolMint. If there is no response, the offer of enrollment is automatically withdrawn and the student goes to the bottom of the wait list.

VI. Learning Stage/Math Level Identification and Enrollment

Student classroom placement is based on the student's stage of learning/math level required (which is not necessarily their previous age-based grade level) and no student progresses to the next stage until he/she has met the benchmark criteria for the preceding stage. These criteria include both standardized achievement tests and stage mastery assessments. For new applicants, it is essential to place the student in the stage that correctly corresponds to his/her stage of learning. For this purpose, IGS will use the same assessments we ordinarily use to make a determination of the student's stage of learning. A list of these benchmark criteria is available to any parent upon request.

All new students entering kindergarten are presumed to be Emerging stage/K level math. They are advanced to the Beginning stage when benchmark assessment indicated that they have met the established learning criteria. Students above the Emerging stage are tentatively offered a space based on the stage/math level for which they are applying. However, before finalizing that placement,

The Intergenerational Schools complete standardized and/or formative assessments to determine the learning stage/math level needed for successful learning.

This is done according to the same criteria applied to all Intergenerational School students. These assessments are used for the sole purpose of determining the correct learning stage/math placement needed and NOT for selection purposes. Any applicant offered admission, who is then determined to need a different learning stage/math level from the one for which the student applied, is offered a space in the correct level matching his/her learning need. If a space is not available in the needed level at that time, the applicant is immediately placed at the top of the waiting list for the needed level.

VII. Non-Discrimination Policy

The Intergenerational Schools do not discriminate on the basis of race, color, religion, sex, gender identity or expression, sexual orientation, national origin, political affiliation or beliefs, athletic performance, special need, genetic information, proficiency in English, physical or mental disability or academic

achievement, family/parental status, income derived from a public assistance program, membership in an employee organization, and does not allow reprisal or retaliation for any prior civil rights activity. Upon admission of any handicapped student, we will comply with all federal and state laws, regarding the education of handicapped students, per ORC 3314.06.

VIII. Public School Notifications

Testing

The Intergenerational Schools is a community school established under Chapter 3314 of the Ohio Revised Code. The school is a public school and students enrolled in and attending the school are required to take proficiency tests and other examinations prescribed by law. In addition, there may be other requirements for students at the school that are prescribed by law. Students who have been excused from the compulsory attendance law for the purpose of home education as defined by the Administrative Code shall no longer be excused for that purpose upon their enrollment in a community school. For more information about this matter contact the school administration or the Ohio Department of Education.

Child Find

School districts across the State of Ohio are participating in an effort to identify, locate, and evaluate all children birth through 21 years of age who may have disabilities. Disability, in this instance, means such conditions as hearing impairments, visual impairments, speech or language impairments, specific learning disabilities, emotionally disturbed, multiple disabilities, mental retardation, other health impairments, physical impairments, autism, and traumatic brain injury. School districts are interested in identifying, locating, and meeting the needs of children with disabilities, including homeless, migrant families, and preschoolers. If you know of any child who may have a disability, contact us public school for more information on how to help.

The School supports and complies with all applicable federal and state laws, procedures and policies regarding the School's child find responsibilities. The School will conduct all child find activities for students who are enrolled in the School (its geographical area) so that they are appropriately located, identified and referred for evaluation. Parents or guardians have the right to review their child's

records and refuse permission to release information (except as required by, or permitted by, law to be released).

Pursuant to Ohio law, the School is required to perform the same child find duties as city, local, exempted village school districts, and will endeavor to adhere to its responsibilities in a manner that does not duplicate the duties of the city, local, or exempted village school districts.

A Child Find Notice shall be published in a newspaper of general circulation in the geographic area covered by the identification activity before any major identification activity.

20 USC § 1412 et seq.; OAC 3301-51-03.

IX. Contact Information

For more information or any questions or concerns regarding any of the above information, please contact the Intergenerational Schools Enrollment Specialist at enroll@igschools.org or 216-978-0568.



Intergenerational S C H O O L S

Accommodating Religious Beliefs

Under ORC 3320.04, IG Schools will make reasonable accommodations for students' religious beliefs and practices. This includes permitting up to three (3) excused absences for religious holidays, modifying the school dress code to accommodate religious attire, adjusting schedules for prayer times, and alternative accommodations regarding testing and other academic requirements due to absences related to religious holidays. The parent/guardian must provide the school with written notice of up to three (3) specific dates for which accommodations are requested if an absence conflicts with testing or other academic requirements. Students seeking religious accommodations should provide written notice from a parent or guardian to the school administration. Below is a non-exhaustive list of major religious holidays or festivals. This list will not be used to deny accommodations to a student for a holiday or festival of the student's faith or religious/spiritual belief system that does not appear on the list.

Major Religious Holidays or Festivals			
Diwali	Eid al-Fitr	Beltane	Mawlid
Holi	Maha Shivaratri	Ash Wednesday	Nirvana Day
Epiphany	Navratri	Ramadan	Imbolc
Bodhi Day	Purim	Shri Ramakrishna Jayanti	Holi
Krishna Janmashtami	Naw Ruz	Shavuot	Ostara
Passover	Rosh Hashanah	Ashura	Yom HaShoah
Lunar New Year	Yom Kippur	Tzom Gedaliah	Vesak
Layla al-Qadr	Vijaya Dashami/Dussehra	Sukkot	Lag B'Omer

www.intergenerationschools.org

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Intergenerational S C H O O L S

PROHIBITION AGAINST AFFIRMATIONS OF SPECIFIC BELIEFS POLICY

The Governing Authority hereby adopts the following Policy regarding specific beliefs, affiliations, ideals, or principles concerning political movements or ideology.

The School is hereby prohibited from doing any of the following:

- I. Soliciting or requiring an employee or applicant for employment or academic admission to affirmatively ascribe to, or opine about, specific beliefs, affiliations, ideals, or principles concerning political movements, or ideology;
- II. Soliciting or requiring a student to affirmatively ascribe to specific beliefs, affiliations, ideals, or principles concerning political movements, or ideology;
- III. Using statements of commitment to specific beliefs, affiliations, ideals, or principles concerning political movements or ideology as part of the evaluation criteria for any employee or applicant for employment, of any employee seeking career progression or benefit; or
- IV. Using statements of commitment to specific beliefs, affiliations, ideals, or principles concerning political movements or ideology as part of the academic evaluation of any student.

Nothing in this Policy shall be construed to prohibit, limit, or restrict any of the following:

- I. The School's authority to require a student or employee to comply with any federal or state law, including anti-discrimination laws, or to take action against a student or employee for violation of any federal or state law;
- II. An educator's academic freedom;
- III. An educator's ability to research or write publications about specific beliefs, affiliations, ideals, or principles concerning political movements, ideology, or social action;
- IV. The School's authority to consider an applicant for employment's scholarship, teaching, or subject matter expertise in the applicant's given academic field; or
- V. The School's authority to offer an established character education program.

The School administrator shall make publicly available all policies, guidance (not to include any protected legal communications or guidance), and training materials used for students and

www.intergenerationschools.org

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staff on all matters regarding specific beliefs, affiliations, ideals, or principles concerning political movements, or ideology. The School administrator has the discretion to determine which policies, guidance, or training materials, if any, meet this requirement and therefore must be made publicly available.



Coversheet

Approval of Annual Report

Section: V. Consent Agenda
Item: F. Approval of Annual Report
Purpose:
Submitted by:
Related Material: IGS-23-24-annual report-draft10.18.24.pdf



Intergenerational S C H O O L S

2023- 2024 Annual Report

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INTRODUCTION

Where children thrive and community grows

Dear Friends,

The 2023-2024 school year marked 24 years since the first Intergenerational School opened in Cleveland, the fifth school year since Covid-19 disrupted education across the globe, and was also my oldest daughter's senior year at HSName, where she graduated with [whatever] after attending Near West Intergenerational School through eighth grade. Violet is one of X,XXX who have found their voice and place in the community, learned to love learning and set their sights on bright futures through our schools—and this family milestone was a poignant reminder to me of the importance and value of our schools for every student and family who attend.

PERSPECTIVES + PERFORMANCE

In this year's report, you'll hear from Learning Partners who have been helping children thrive and community grow for years—sometimes decades! You'll also hear from parents, teachers and students about the joyful, creative, individual and sometimes messy work of developing a love of learning across our schools.

And while our approach remains as outside-the-box as it has always been, we continue to outperform many of our neighboring schools in academic progress and achievement, as you'll read in each school's By the Numbers report. Our students are thriving, and we have our entire school community to thank—the families, teachers, learning partners, board members, students and staff who embody our mission and work every day to grow.

A YEAR OF TRANSITION

The school year closed out with a critical decision and a significant change for our school network: On June 11, the boards of The Intergenerational School – East and Lakeshore Intergenerational School voted unanimously to merge, making 2023-2024 the last school year for LIS. With key staff vacancies, low enrollment and preliminary state test scores showing signs of the strain, our board recognized the urgent need to bolster our school community by bringing these two schools together. School leaders worked diligently to help teachers and students transition to TIS-East, where we can continue to provide high quality, individualized and innovated K-8 education.

LOOKING AHEAD

And while this report covers our schools' activities and achievements in 2023-2024, we cannot end this monumental year on a cliffhanger. I'm happy to share that TIS-East welcomed XX teachers and XX students from LIS on the first day of the 2024-2025 school year, affirming the difficult choice was the right one. We're stronger together—and continuing to grow our community so our students can thrive. To learn more about what is ahead for the Intergenerational Schools, please see the last page of this report for an overview of our strategic plan.

Thank you,



Brooke King

CEO, Intergenerational Schools

OUR MISSION

The Intergenerational Schools connect, create, and guide a multi-generational community of lifelong learners and spirited citizens as they strive for academic excellence.

OUR VISION

The Intergenerational Schools are a top choice in public education for Greater Cleveland families. We foster joyful and independent academic and social-emotional learning that allows students and learning partners to excel both individually and together in one equitable community. As innovative and progressive educators, we are catalysts and collaborators in improving public community. As innovative and progressive educators, we are catalysts and collaborators in improving public education.

About the Intergenerational Schools

Our award-winning and nationally recognized model is 100% focused on fostering student achievement and growth in a multi-generational environment.

The Intergenerational Schools are an award-winning **network of K-8 public charter schools** in Cleveland where children learn developmentally (at their own pace) based on mastery, and in a diverse and supportive community environment.

Our schools have **small, multi-age classes** that allow children to receive an individualized education based on what each child needs next in their learning. In this setting, students have the opportunity to be both a teacher and a learner.

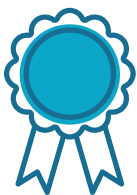
Older adults from the community serve as **Learning Partners**, who help students develop a love of reading and learning. They share stories and experiences together, play math games, and forge **positive intergenerational relationships** together. Each class also ‘adopts’ the residents at area senior facilities. They visit and partake in mutual

learning activities. These experiences help develop valuable social emotional skills and help to enforce the learning in the classroom.

The Intergens are nonprofit, public charter schools, which means any student can attend for free, there is no selection process, and the schools provide Special Education and other student services required by law. Our performance is measured alongside traditional district schools through the same state tests, but the charter model allows us the flexibility to innovate.

Since 2000, we have been challenging the status quo in elementary education, and our approach has been recognized in Cleveland and internationally. Our students go on to high quality public and private high schools with the skills they need to succeed and thrive in school and beyond.

Community Schools of Quality Designation



We are proud to say all three of our schools were designated as Community Schools of Quality by the Ohio Department of Education in 2023-2024.

The schools received higher performance index scores (measuring overall student achievement)

than the local district on the two most recent report cards. In addition, the schools achieved 4-star value-added ratings (measuring student growth as being more than one full year in a year’s time). These two measures, along with being sponsored, or accredited, by a high quality sponsor, qualified them for this distinction.

THE INTERGENERATIONAL SCHOOL – EAST

Story Headline Goes Right Here.

Students at TIS hosted their second highly anticipated annual Market Day, transforming their learning environment into a bustling marketplace. The event offered students an opportunity to showcase their creativity, talents, entrepreneurial spirit, and financial literacy by developing, marketing, and selling a variety of products. This hands-on experience allowed them to engage in real-world business practices, from pricing and promotion to customer service, fostering skills they will carry well beyond the classroom.

The students' hard work paid off, generating an impressive total of over \$1,400 in combined sales. Classes contributed unique ideas, creating a diverse array of goods.

True to the school's mission of fostering both boundless learning and a sense of spirited citizenship, the students donated 10% of their profits—amounting to \$140—to two meaningful causes. This year's recipients were St. Jude's Children's Research Hospital and the Do It For James Foundation, organizations committed to life-changing care and support for children and youth. Market Day 2024 not only reinforced our students' learning but also directly demonstrated how they make a tangible impact on the world around them.



Market Day has become a beloved tradition at TIS, exemplifying the school's commitment to experiential learning and character development. Throughout the preparation process, students worked collaboratively, refining their business plans, assigning roles, and problem-solving in real time. Teachers guided them in setting realistic goals, tracking expenses, and understanding the importance of customer engagement. These essential life skills, integrated into the project, empowered students to connect classroom concepts to meaningful, hands-on experiences.

The success of Market Day 2024 reflects not only the students' dedication but also the strong support of the school community. Families, staff, and other members of the IG community eagerly participated, contributing to the vibrant atmosphere that made the event so special. Beyond the numbers and products sold, the day fostered a sense of accomplishment and joy among the students, instilling confidence in their abilities. As they look ahead to future Market Days, students are already reflecting on what they learned and brainstorming ways to expand their businesses and deepen their impact.

ABOUT THE SCHOOL

The Intergenerational School (TIS - East) is transforming the educational experience for students and families. For over 20 years, TIS – East has been a leader in K-8 education with an approach like no other public school. Our students are curious learners surrounded by innovative learning opportunities, making TIS – East a top performing school and a joyful place to learn. The Intergenerational School is part of an award-winning network of public charter schools in Cleveland that help children learn at their own pace in a diverse and supportive community environment. **The Intergenerational Schools have small, multi-age/multi-grade classes, individually paced learning, a nationally recognized educational model, and Intergenerational Learning Partners from the community to support every child.**

The Intergenerational School – East

2023-2024 School Year By the Numbers

TOTAL ENROLLMENT **AVERAGE CLASS SIZE**

200 **##**

2023-2024 PRINCIPAL
Dr. Mario Clopton

OUR STUDENTS ARE FROM:

Bedford	1.0%
Cleveland	82.5%
Cleveland Heights	3.5%
East Cleveland	1.5%
Euclid	0.5%
Garfield Heights	5.5%
Maple Heights	4.0%
South Euclid	0.5%
Warrensville Heights	1.0%

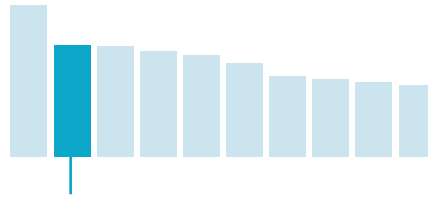
STUDENT DEMOGRAPHICS*

White	0.5%
Black	93.5%
Asian	0.5%
Native American	0%
Hispanic	3.0%
Multiracial	2.5%
Students with Disabilities	17%
Economic Disadvantage	72%

*As of the last day of the school year.

ACADEMIC PERFORMANCE

Overall Rating



TIS-East outperformed 8 of the 9 neighborhood public schools in achievement.

71%

TIS-East students outscored their peers at 9 neighborhood public schools 71% of the time.

FINANCIAL DATA**

Income	
State	\$ 2,932,530
Federal	1,156,082
Tax Distribution	13,456
Philanthropy	-
Other	196,000
Total Income	\$ 4,298,068

Expenses	
Salaries + Benefits	\$ 2,279,159
Purchased Services	1,222,508
Supplies & Materials	165,445
Other	53,928
Total Expenses	\$ 3,721,040

Surplus/(Deficit) \$ 577,029
**Unaudited

SCHOOL BOARD

Stacy Miller
CHAIR

Danielle Clark
VICE CHAIR

Joanna Lopez-Inman Esq
SECRETARY, GOVERNANCE ADVISORY COUNCIL

Lynn Carpenter
FINANCE ADVISORY COUNCIL, CHAIR

Bob Nicolay
GOVERNANCE ADVISORY COUNCIL, CHAIR

Richaun Bunton
EDUCATION ADVISORY COUNCIL, CHAIR

Steven Lake, EdD
SCHOOL REPRESENTATIVE, FRIENDS OF INTERGENERATIONAL SCHOOL

Brad Norton
BOARD MEMBER

SPONSOR STATEMENT

The Educational Service Center of Lake Erie West (ESCLEW) served as sponsor for The Intergenerational School during the 2023-2024 school year. ESCLEW monitored the school's academic and fiscal performance, as well as organization and operation of the school, and determined that the school was overall compliant.

CONTACT THE SCHOOL

11327 Shaker Blvd Ste 200E
Cleveland, OH 44104
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NEAR WEST INTERGENERATIONAL SCHOOL

A Retired Teacher Returns to the Classroom

Learning Partners play a vital role in intergenerational learning at Intergenerational Schools. Julie Rae, a retired Lakewood City Schools teacher, is one of many volunteers who work as Learning Partners with Near West students, offering one-on-one academic practice to complement classroom instruction, peer learning and the support they get at home to encourage a love of learning.

Julie shared how she helps students build confidence, recalling moments when students approach her shyly, their heads down. “I remind them learning is tough, and mistakes are how we grow,” she explained. By tailoring her approach to each student, Julie helps them understand concepts in a way that works for them. As confidence builds, she encourages them: “Look! You thought you couldn’t do it, but you did!”

She believes this individual attention is the program’s greatest asset. “It’s a chance to reteach and correct errors privately—something that’s

hard to do in a classroom,” she said, adding that many students crave this focused support.

She said Learning Partners would have been a welcome addition to her own classroom, supporting personalized relationships that nurture both academic and emotional growth.

Julie’s work helps cultivate the school’s culture of support, encouraging students to believe in themselves and persevere. Her passion for guiding students academically and emotionally embodies the heart of the Learning Partner program, showing how dedicated attention can make a lasting impact.

“I can be another adult who encourages students to believe in themselves, to try hard, and to persevere despite challenges.”

- Julie Rae

ABOUT THE SCHOOL

In 2011, a group of parents seeking a high-quality public school for their children helped bring this award-winning educational model to Ohio City. Today, Near West Intergenerational School is a top performing school whose students are excelling in the areas of Language Arts and Mathematics. Near West is part of an award-winning network of public charter schools in Cleveland that help children learn at their own pace in a diverse and supportive community environment. **The Intergenerational Schools have small, multi-age/multi-grade classes, individually paced learning, a nationally recognized educational model, and Intergenerational Learning Partners from the community to support every child.**

Near West Intergenerational School

2023-2024 School Year By the Numbers

TOTAL ENROLLMENT **AVERAGE CLASS SIZE**

211 **##**

2023-2024 PRINCIPAL
April Maimone

OUR STUDENTS ARE FROM:

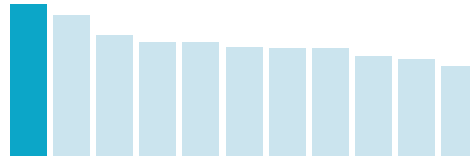
Bay Village	0.9%
Brooklyn	1.9%
Cleveland	82.0%
Cleveland Heights	0.9%
Elyria	1.4%
Euclid	0.9%
Fairview Park	1.4%
Garfield Heights	1.9%
Lakewood	0.9%
Maple Heights	0.5%
Newburg Heights	0.5%
North Olmsted	1.9%
Oberlin	0.5%
Parma	1.4%
Parma Heights	0.9%
Twinsburg	1.9%

STUDENT DEMOGRAPHICS

White	35.5%
Black	32.2%
Asian	0.5%
Native American	0.5%
Hispanic	24.6%
Multiracial	0.0%
Students with Disabilities	20%
Economic Disadvantage	64%

*As of the last day of the school year.

ACADEMIC PERFORMANCE



Near West outperformed all 10 of the closest peer schools across the state performance index—as well as gap closing and achievement.



Near West's overall rating is the highest among all district and charter schools in the city of Cleveland.

Overall Rating
★★★★★

FINANCIAL DATA**

Income	
State	\$ 1,950,145
Federal	547,318
Tax Distribution	192,677
Philanthropy	-
Other	158,821
Total Income	\$ 2,848,961
Expenses	
Salaries + Benefits	1,294,674
Purchased Services	979,059
Supplies & Materials	116,518
Other	38,552
Total Expenses	\$ 2,428,803
Surplus/(Deficit)	\$ 420,157

**Unaudited

SCHOOL BOARD

- Stacy Miller**
CHAIR
- Danielle Clark**
VICE CHAIR
- Joanna Lopez-Inman Esq**
SECRETARY, GOVERNANCE ADVISORY COUNCIL
- Lynn Carpenter**
FINANCE ADVISORY COUNCIL, CHAIR
- Bob Nicolay**
GOVERNANCE ADVISORY COUNCIL, CHAIR
- Richaun Bunton**
EDUCATION ADVISORY COUNCIL, CHAIR
- Carolyn Wald**
SCHOOL REPRESENTATIVE, FRIENDS OF INTERGENERATIONAL SCHOOL
- Brad Norton**
BOARD MEMBER

SPONSOR STATEMENT

Near West Intergenerational School is proudly sponsored by the Cleveland Metropolitan School District. For more information please visit www.clevelandmetroschools.org/Page/13633

CONTACT THE SCHOOL

3805 Terrett Avenue
Cleveland, OH 44113
(216) 961-4308

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LAKESHORE INTERGENERATIONAL SCHOOL

Learning Partners Build Community Across the Years

While 2023-2024 is a bittersweet milestone in our school network's history as the last year of operation for Lakeshore International School, the year was filled with joyful community building, individualized learning and inspiring experiences for students, staff and volunteers. One person who has been deeply engaged with the Intergens community at Lakeshore and beyond is Elizabeth Levert, one of our longest-serving and most dedicated Learning Partners.

Newly retired from the U.S. Postal Service in 2002, Elizabeth Levert had just finished an exercise class at Fairhill Center when she noticed a call for volunteers on a bulletin board. She began volunteering at The Intergenerational School as a Reading Mentor and has been with the school ever since.

Elizabeth has been a constant presence, volunteering weekly and building strong connections with students by learning about their lives and encouraging them to explore reading at home. She was the first Learning

Partner at Lakeshore when it opened in 2014 and continued to volunteer there through the 2023-2024 school year.

When practicing reading with young students, Elizabeth prioritizes relationship-building over perfection, allowing children to write their names, ask questions, and engage with the story.

"Being a Learning Partner does my heart good," said Elizabeth. With her own grandchildren in Oklahoma, Elizabeth treasures her time with students. "It is amazing the change in the students from the beginning of the year to the end of the year—how they have grown!"

As one of the longest-serving Learning Partners, Elizabeth's kindness and passion for reading have positively impacted countless students over the past two decades.

"Being a Learning Partner does my heart good."

- Elizabeth Levert

ABOUT THE SCHOOL

Lakeshore Intergenerational School (LIS) is a public charter school in Cleveland's Collinwood neighborhood. This growing school educates students in grades K-8. Students thrive in a diverse community of intergenerational learners. Lakeshore is part of an award-winning network of public charter schools in Cleveland that help children learn at their own pace in a diverse and supportive community environment. **The Intergenerational Schools have small, multi-age/multi-grade classes, individually paced learning, a nationally recognized educational model, and Intergenerational Learning Partners from the community to support every child.**

Lakeshore Intergenerational School

2023-2024 School Year By the Numbers

TOTAL ENROLLMENT

114

AVERAGE CLASS SIZE

##

2023-2024 PRINCIPAL
Curtis Walker

OUR STUDENTS ARE FROM:

Cleveland	77.2%
Cleveland Heights	1.8%
Euclid	18.4%
Garfield Heights	0.9%
South Euclid	0.9%

STUDENT DEMOGRAPHICS*

White	4.4%
Black	94.7%
Asian	0%
Native American	0%
Hispanic	0%
Multiracial	0%
Students with Disabilities	20%
Economic Disadvantage	100%

*As of the last day of the school year.

ACADEMIC PERFORMANCE



Highlights

Students outperformed the nearest neighborhood school in gap closing, performance and achievement benchmarks.

FINANCIAL DATA**

Income	
State	\$ 1,950,145
Federal Tax Distribution	547,318
Philanthropy	192,677
Other	-
Total Income	\$ 2,848,961
Expenses	
Salaries + Benefits	1,294,674
Purchased Services	979,059
Supplies & Materials	116,518
Other	38,552
Total Expenses	\$ 2,428,803
Surplus/(Deficit)	\$ 420,157

**Unaudited

SCHOOL BOARD

- Lynn Carpenter**
CHAIR, FINANCE ADVISORY COUNCIL MEMBER
- Stacy Miller**
VICE CHAIR, EDUCATION ADVISORY COUNCIL MEMBER
- Joanna Lopez-Inman Esq**
SECRETARY, GOVERNANCE ADVISORY COUNCIL MEMBER
- Richaun Bunton**
EDUCATION & ENROLLMENT ADVISORY COUNCIL MEMBER
- Karen Chambers**
HR ADVISORY COUNCIL MEMBER
- Danielle Clark**
FINANCE ADVISORY COUNCIL MEMBER
- Mark Olson**
FACILITIES ADVISORY COUNCIL CHAIR

SPONSOR STATEMENT

Lakeshore Intergenerational School is proudly sponsored by the Cleveland Metropolitan School District. For more information please visit www.clevelandmetroschools.org/Page/13633

CONTACT THE SCHOOL

18025 Marcella Road
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Looking Forward

OUR 2024-2025 STRATEGIC PLAN

Each year, we revisit and refine our strategic plan to build on past progress, adapt to change and ensure we are continually working toward our vision. The four main goals below were set in 2023, with our strategic approach evolving each school year. We are encouraged by the progress to date on each of these goals and will continue to work toward target outcomes to support boundless learning and strong community through our work.

Goal 1

Every student will experience a high-quality, developmental, multi-age education in a social and emotionally safe environment centered on intergenerational learning opportunities.

Target Outcome: Assessments show growth and achievement.

NWEA assessments show school-wide growth at 50th percentile+, OR overall achievement percentile increases in state test scores.

Goal 2

Educators and staff will exemplify the knowledge and competencies needed to ensure the success of every student within the Intergenerational Model.

Target Outcome: Hire and retain more licensed teachers.

At least 80% of fully licensed teachers sign their contract for following year.

Goal 3

The Intergenerational Schools foster home-school partnerships that center student success, family voice, and clarity of the intergenerational model.

Target Outcome: Enrollment & Retention

Enrollment number reaches target for each school, and overall student retention stays at 95% or higher.

Goal 4

Create consistent policies and procedures to align, promote, and support shared accountability and sustainability of the intergenerational educational model.

Target Outcome: Fiscal Management & Fundraising

Keep core deficits at or below budget and raise \$530,000 in FY25.

COMMUNITY PHILANTHROPY

“It’s rewarding to be part of a school network that works so hard to cultivate community connections and a love for learning in its students.”

–Kelly Lytle, FIGS Board Chair

With a Little Help from Our Friends

Friends of Intergenerational Schools (FIGS) was established to support the fiscal and programmatic needs of Intergenerational Schools (IGS).

Board members champion the mission and serve as active ambassadors in the community, both in person and online, representing the organization with a unified voice, sharing knowledge and raising awareness to support our schools.

Several FIGS Board Members also serve as Learning Partners, including Board President Kelly Lytle. He describes the experience as, “The moments of joy you’ll have learning with and from the students are just good medicine for your soul!”

Kelly and the students he has partnered with laugh a lot and sometimes put down the books to talk about science or math, homework and projects coming due, weekend fun, or sports. More than once, he admits, “Students and I have had to be reminded to watch our volume while in the library.” He goes on to say, “It’s rewarding to be part of a school network that works so hard to cultivate community connections and a love for learning in its students.”

FIGS BOARD OF DIRECTORS 2023-2024

Kelly Lytle
CHAIR

Matthew Grimes

Cena Hilliard

Steven Lake, EdD

Carolyn Wald

Susan Paul

Amanda Yoho



Become a Friend of the Intergenerational Schools

We do more with less. Give today to build community and support lifelong learning.

The Intergenerational Schools receive less in per-student state funding than neighboring schools that are part of the local school district. Small classes and less in per-student funding means the support of our community enables the valuable experiences, like the Learning Partners and Intergenerational visits, that benefit both students and seniors.

Friends of the Intergenerational Schools is a 501(c)(3) nonprofit organization positioned to raise funds on behalf of the Intergenerational Schools to close this funding gap.

Help us transform public school education! Make a gift today at igschools.org/donate



Intergenerational

S C H O O L S

Near West Intergenerational School

3805 Terrett Avenue
Cleveland, Ohio 44113

216.961.4308

The Intergenerational School - East

11327 Shaker Boulevard
Suite 200E
Cleveland, Ohio 44104

216.721.0120

igschools.org

Coversheet

ESCLEW Sponsor Report

Section: VIII. Sponsor Reports
Item: A. ESCLEW Sponsor Report
Purpose:
Submitted by:
Related Material: October - TIS sponsor update (1).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: October

Presented by:	Joyce Lewis	In person
Governing Authority Highlights / Important updates from ESCLEW	<p>ESCLEW is finalizing updates to the Performance Accountability Framework (Contract Attachment 11.6), and the revised template will be sent to schools, management companies, and boards in October, however the school governance goals remain unchanged, focusing on:</p> <ul style="list-style-type: none"> ● Board Engagement ● Required Number of Regular Board Meetings ● Required Number of Board Members ● Proper Meeting Notice ● Required Board Member Training 	
Recent Site Visit Highlights	<p>During the classroom observations, the teachers demonstrated effective classroom management. Additionally, they circulated the room to offer assistance, creating an environment where students felt comfortable asking for help.</p>	
Financial Update	<p>The ESCLEW Community Schools Financial Consultant held a monthly meeting with the school’s treasurer, a completed report was emailed following the meeting. If you have any concerns with your school’s financials, please contact your school’s 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- Summer Cookout, Fall Festival Danielle- Stacey- Fall Festival Richaun- Lynn-Fall Festival Carolyn-					
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:					
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: August- 5					
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: In compliance					



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: Joanna- Danielle- Stacey- completed Richaun- Lynn- Carolyn-					
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: August- 4/5					

Coversheet

Advisory Council Priorities including FIGS

Section: IX. Governance Advisory Council
Item: A. Advisory Council Priorities including FIGS
Purpose: Discuss
Submitted by:
Related Material: Advisory Council Priorities 2024 (1).docx

Advisory Council Priorities 2024

EDUCATION

1. Review NWEA and state test scores
2. Monitor and provide feedback on Report Card rollout. Recommend plan for communication to families
3. **Advise a Board Task Force** for review, refresh **School Values** to determine methodology for measuring and communicating progress with families. We have taken these off the school report cards until we can revise them and make them more culturally appropriate.
4. Monitor and provide feedback on new site-based instructional coaching model & TBT's
5. Oversee revision of the **Educational Plan** (last revised in 2022-not since new Reading Curriculum)

FACILITIES

1. Negotiate new lease for NWIS
2. Research and understand operating costs at TIS - propose efficiencies
3. Research and recommend options to rent out space we own
4. Research and make recommendation on buying additional floors at TIS building

FINANCE

1. Work with Mangen to complete 5 year forecast model with assumptions we can modify that we can keep updated and use to plan going forward. The Council should plan on presenting and explaining model to full board at least twice a year.
2. Revise the **IGCle Agreement** with the Schools

GOVERNANCE

1. Recommend (2?) and elect new school board members and 8 new FIGS members
2. Develop and recommend succession plan for senior leadership
3. Research and recommend a process for board evaluation

HUMAN RESOURCES

1. Recommend improvements to recruiting process for next school year
2. Review Staff Handbook for 2025-2026 Revisions
3. Revise/Implement evaluation system for all non-teaching positions
4. Further explore partnership with MUST at CSU and other teacher training opportunities

Coversheet

Sponsor Education

Section: X. Education Advisory Council
Item: A. Sponsor Education
Purpose: FYI
Submitted by:
Related Material: Board Ed 10-23-2024.pptx

Sponsor Evaluation

Non-Academic Sponsor Measures

		Sponsor CMSD (NW)	Sponsor ESCLEW (TIS)	Our Own Strategic Plan Indicators
Financials		(45/150 points)		
Current Year Enrollment Variance from Budgeted Enrollment	Monthly	X	X	X
Enrollment Sustainment throughout school year (FTE beg of yr to end of yr)	Monthly		X	X
Sustainability Year to Year (Student Retention from Oct to Oct)	Oct		X	X Beg to End Yr
Ratio of Assets to Liabilities	Monthly Statements	X	X	
Unrestricted Days of Cash		X	X	
Debt management		X	X	
Total Expense Variance from Budget		X	X	
Change in Net Assets		X	X	
Sponsor financial reporting submitted on time each month		X	X	
Audit Findings		Yearly	X	X
Annual 5-Year Forecasts and Budgets Submitted	Bi-annually	X	X	
Governance				
Board Engagement: attend 2+ school events	End of year		X	
Hold 6 board meetings/year	End of year	X	X	
At least 5 Board members	End of year	X	X	
Proper meeting notice	Ongoing	X	X	
Board member attendance for meetings	Ongoing	X	X	
Organizational/Legal/Compliance		(45/150 points)		
<i>(List of over 200 ORC compliance items that are collected and documented at various months through the year or monthly)</i>				
On-time records submission of ORC required items	monthly	X	X	
Accuracy of records submission of ORC required items	monthly	X	X	
Annual Report submission	Oct	X	X	
Emergency Management Plan submission	Aug	X	X	
Student Discipline K-3 HB 318	ongoing	X	X	
Student Discipline 4-8		X	X	
Special Education policies and practices		X	X	
Health & Safety		X	X	
Staffing & Employment		X	X	
Governance (including meetings, practices and trainings)		X	X	
Admissions, Enrollment and Attendance		X	X	
Education Program		X	X	
Fiscal		X	X	
Other		X	X	
Mission-specific goal written into Amendment 11.6 of contract			X	

Over 200 items annually

Academic & Educational Measures

		Sponsor CMSD (NW)	Sponsor ESCLEW (TIS)	Our Own Strategic Plan Indicators	
Ohio State Test Report Card		(50/150 points)			
Overall Rating (1-5 stars)	Spring tests taken in ELA, Math, Science in April	X	X		
Achievement (1-5 stars)		X	X		
-ELA and Math Achievement and Growth Indicators* (% met)		X			
Performance Index* (%) measures every test taken by every student at every level		X	X		
-Compare PI to 2 Similar Schools			X		
Progress/Growth (1-5 stars) did students make 1 year's growth since prior year (<,>)		X	X		
Gap Closing (1-5 stars) Looks at PI by all subgroups (SpEd, Econ Dis, Race)		X	X		
Early Literacy (1-5 stars)		Results out Aug/Sept following year	X	X	
-3 rd Grade Proficiency (%)				X	
-Promotion to 4 th Grade (%)				X	
-Imp K-3 Lit (RIMPS %) how many were on a plan and improved?			X		
Comparison to Peer Group for each of the above Report Card Indicators		X			
Attendance/Chronic Absenteeism (%)	End of year	X	X		
Nationally Normed Assessments NWEA MAP Tests					
Reading Achievement performance on grade level (%)	Taken in Aug/Sept, Jan, May		X	x	
Math Achievement performance on grade level (%)			X	x	
Reading Growth (% of students growing 1 year from beginning to end of year)			X	X goal is 50%-ile	
Math Growth (% of students growing 1 year from beginning to end of year)			X	X goal is 50%-ile	
Reading OR Math Growth (%)			X		
Subgroup: Students w/Disabilities Growth			X		
High Quality Teaching & Learning in the Intergenerational Model					
PBIS-do we have a positive behavior intervention system in place (Yes/No)			X		

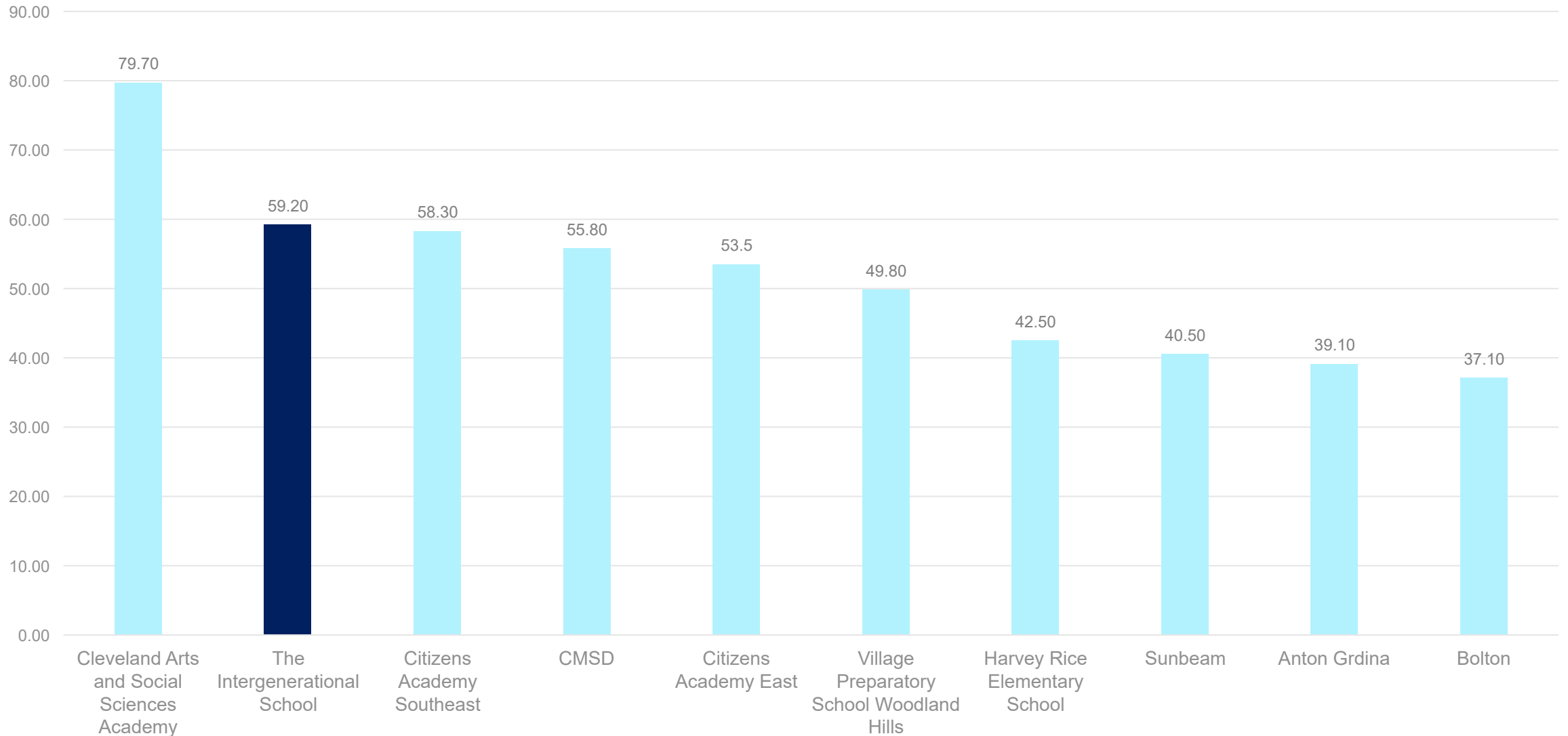
Academic & Educational Measures

		Sponsor CMSD (NW)	Sponsor ESCLEW (TIS)	Our Own Strategic Plan Indicators	
Ohio State Test Report Card		(50/150 points)			
Overall Rating (1-5 stars)	Spring tests taken in ELA, Math, Science in April	X	X		
Achievement (1-5 stars)		X	X		
-ELA and Math Achievement and Growth Indicators* (% met)		X			
Performance Index* (%) measures every test taken by every student at every level		X	X		
-Compare PI to 2 Similar Schools			X		
Progress/Growth (1-5 stars) did students make 1 year's growth since prior year (<,>)		X	X		
Gap Closing (1-5 stars) Looks at PI by all subgroups (SpEd, Econ Dis, Race)		X	X		
Early Literacy (1-5 stars)		Results out Aug/Sept following year	X	X	
-3 rd Grade Proficiency (%)				X	
-Promotion to 4 th Grade (%)				X	
-Imp K-3 Lit (RIMPS %) how many were on a plan and improved?			X		
Comparison to Peer Group for each of the above Report Card Indicators		X			
Attendance/Chronic Absenteeism (%)	End of year	X	X		
Nationally Normed Assessments NWEA MAP Tests					
Reading Achievement performance on grade level (%)	Taken in Aug/Sept, Jan, May		X	x	
Math Achievement performance on grade level (%)			X	x	
Reading Growth (% of students growing 1 year from beginning to end of year)				X	X goal is 50%-ile
Math Growth (% of students growing 1 year from beginning to end of year)				X	X goal is 50%-ile
Reading OR Math Growth (%)				X	
Subgroup: Students w/Disabilities Growth				X	
High Quality Teaching & Learning in the Intergenerational Model					
PBIS-do we have a positive behavior intervention system in place (Yes/No)			X		

Spring OST Comparisons

	School Name	Overall	Progress	Gap Closing	Early Literacy	Achievement	PI Score
	The Intergenerational School	2.00	2.00	1.00	2.00	2.00	59.20
CMSD	Anton Grdina	2.00	2.00	2.00	1.00	1.00	39.10
CMSD	Bolton	2.50	3.00	2.00	1.00	1.00	37.10
Breakthrough Charter	Citizens Academy East	3.00	4.00	3.00	1.00	2.00	53.5
Breakthrough Charter	Citizens Academy Southeast	3.00	4.00	3.00	1.00	2.00	58.30
Charter	Cleveland Arts and Social Sciences Academy	4.00	4.00	5.00	2.00	3.00	79.70
CMSD	CMSD	3.00	4.00	3.00	1.00	2.00	55.80
CMSD	Harvey Rice Elementary School	2.50	3.00	2.00	1.00	1.00	42.50
CMSD	Sunbeam	2.50	3.00	3.00	1.00	1.00	40.50
Breakthrough Charter	Village Preparatory School Woodland Hills	2.00	3.00	1.00	1.00	1.00	49.80

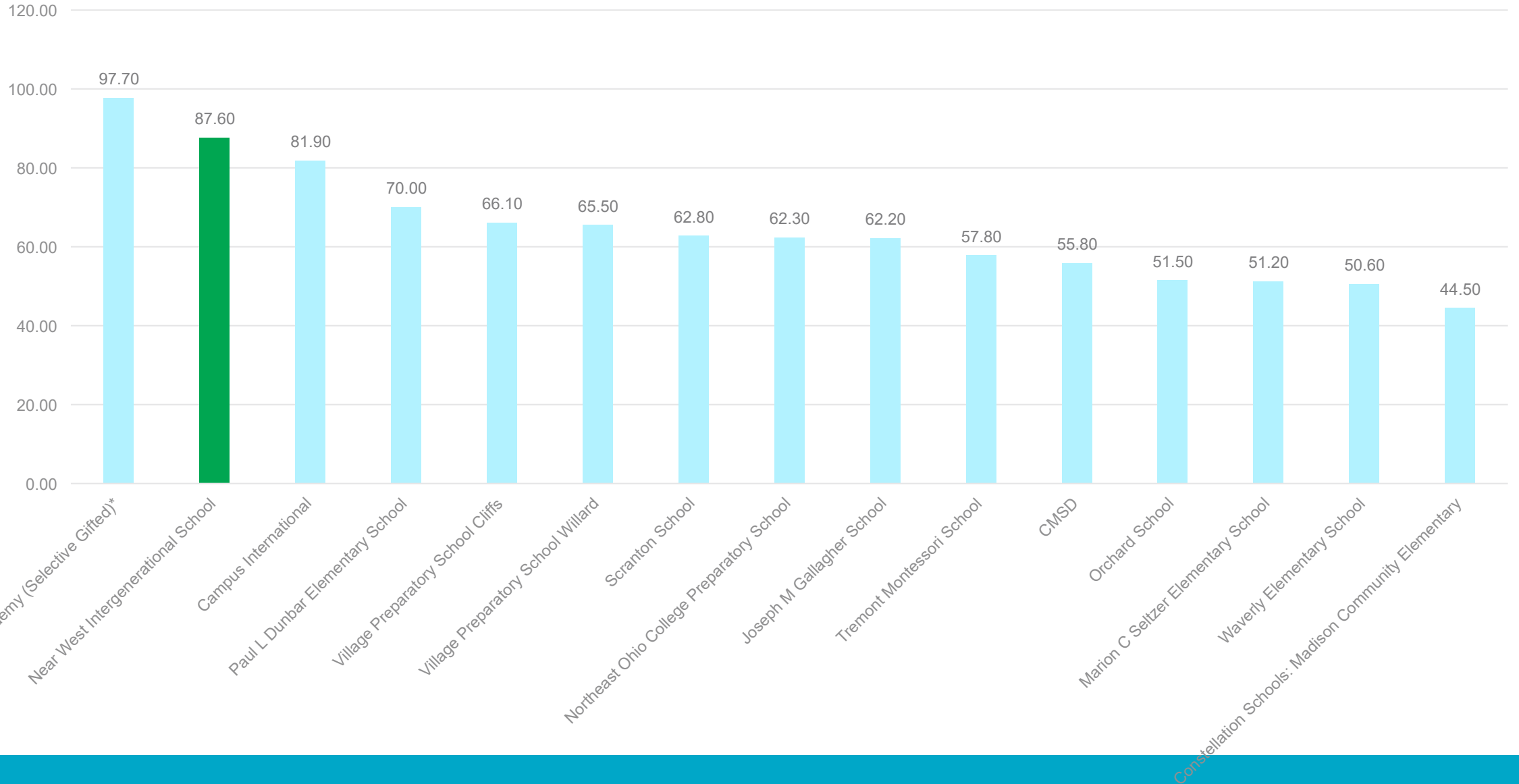
TIS-East Neighborhood Public Schools Achievement: Performance Index



School Name	3rd Grade ELA 2024	3rd Grade Math 2024	4th Grade ELA 2024	4th Grade Math 2024	5th Grade ELA 2024	5th Grade Math 2024	5th Grade Science 2024	6th Grade ELA 2024	6th Grade Math 2024	7th Grade ELA 2024	7th Grade Math 2024	8th Grade ELA 2024	8th Grade Math 2024	8th Grade Science 2024
The Intergenerational School	31.80%	18.20%	35.70%	21.40%	76.20%	19.00%	23.80%	42.10%	10.50%	59.30%	25.90%	21.70%	17.40%	21.70%
Anton Grdina	19.20%	3.80%	12.50%	0.00%	16.00%	12.00%	12.00%	0.00%	0.00%	7.10%	3.60%	11.10%	5.60%	16.70%
Bolton	11.80%	11.80%	19.00%	9.50%	27.30%	0.00%	9.10%	7.10%	0.00%	9.10%	0.00%	0.00%	0.00%	0.00%
Citizens Academy East	37.10%	39.70%	33.80%	23.90%	36.60%	9.90%	36.60%	41.30%	16.00%	33.90%	22.00%	31.40%	24.30%	34.30%
Citizens Academy Southeast	37.10%	39.70%	33.80%	23.90%	36.60%	9.90%	36.60%	41.30%	16.00%	33.90%	22.00%	31.40%	24.30%	34.30%
Cleveland Arts and Social Sciences Academy	45.20%	64.50%	48.10%	66.70%	41.70%	75.00%	45.80%	54.30%	45.70%	62.50%	57.50%	20.00%	80.00%	88.00%
CMSD	35.30%	32.00%	33.50%	29.30%	37.90%	20.60%	24.00%	21.90%	16.10%	32.30%	20.30%	21.00%	19.30%	28.60%
Harvey Rice Elementary School	26.70%	7.10%	22.90%	12.80%	11.40%	0.00%	0.00%	10.20%	2.00%	14.00%	6.00%	10.80%	15.80%	13.20%
Sunbeam	25.60%	11.60%	10.30%	5.00%	14.60%	0.00%	4.90%	12.10%	0.00%	12.50%	0.00%	9.10%	9.10%	15.20%
Village Preparatory School Woodland Hills	17.70%	14.50%	31.30%	14.10%	17.50%	16.10%	11.10%	26.90%	9.60%	26.50%	14.30%	13.20%	5.70%	32.10%

	School Name	Overall	Progress	Gap Closing	Early Literacy	Achievement	PI Score
	Near West Intergenerational School	4.50	4.00	5.00	4.00	3.00	87.60
	CMSD	3.00	4.00	3.00	1.00	2.00	55.80
district	Joseph M Gallagher School	3.50	5.00	3.00	1.00	2.00	62.20
charter	Menlo Park Academy (Selective Gifted)*	3.50	1.00	4.00	5.00	4.00	97.70
district	Orchard School	2.50	3.00	2.00	1.00	1.00	51.50
district	Paul L Dunbar Elementary School	3.50	5.00	4.00	1.00	2.00	70.00
district	Campus International	4.00	3.00	5.00	4.00	3.00	81.90
charter	Constellation Schools: Madison Community Elementary	2.00	3.00	1.00	1.00	1.00	44.50
district	Marion C Seltzer Elementary School	2.00	3.00	1.00	1.00	1.00	51.20
charter	Northeast Ohio College Preparatory School	3.00	4.00	2.00	1.00	2.00	62.30
district	Scranton School	3.50	5.00	4.00	2.00	2.00	62.80
district	Tremont Montessori School	3.00	3.00	4.00	1.00	2.00	57.80
Breakthrough charter	Village Preparatory School Willard	3.00	3.00	5.00	1.00	2.00	65.50
district	Waverly Elementary School	2.50	3.00	2.00	1.00	1.00	50.60
Breakthrough charter	Village Preparatory School Cliffs	4.00	5.00	5.00	1.00	2.00	66.10

Near West Neighborhood Public Schools Achievement: Performance Index



School Name	3rd Grade ELA 2024	3rd Grade Math 2024	4th Grade ELA 2024	4th Grade Math 2024	5th Grade ELA 2024	5th Grade Math 2024	5th Grade Science 2024	6th Grade ELA 2024	6th Grade Math 2024	7th Grade ELA 2024	7th Grade Math 2024	8th Grade ELA 2024	8th Grade Math 2024	8th Grade Science 2024
Near West Intergenerational School	83.30%	66.70%	75.00%	70.80%	66.70%	62.50%	75.00%	66.70%	42.90%	78.60%	71.40%	44.40%	55.60%	77.80%
CMSD	35.30%	32.00%	33.50%	29.30%	37.90%	20.60%	24.00%	21.90%	16.10%	32.30%	20.30%	21.00%	19.30%	28.60%
Joseph M Gallagher School	38.50%	47.70%	27.80%	38.90%	32.80%	26.20%	32.80%	32.50%	20.80%	54.10%	26.20%	27.60%	17.20%	42.10%
Menlo Park Academy (Selective Gifted)*	88.50%	81.80%	90.00%	62.20%	91.40%	40.00%	77.10%	78.80%	63.60%	93.20%	73.50%	n/a	n/a	n/a
Orchard School	27.10%	27.10%	20.50%	25.00%	31.30%	6.30%	8.30%	14.80%	11.10%	3390.00%	14.30%	21.70%	12.90%	26.10%
Paul L Dunbar Elementary School	33.30%	63.30%	22.20%	31.10%	35.70%	35.70%	14.30%	42.90%	82.10%	39.00%	87.80%	25.00%	95.80%	25.00%
Campus International	74.70%	74.30%	75.30%	67.10%	68.40%	42.30%	40.50%	47.80%	35.70%	63.00%	34.70%	68.10%	15.20%	63.80%
Constellation Schools: Madison Community Elementary	26.70%	6.70%	33.30%	16.70%	18.80%	12.50%	12.50%	16.70%	11.10%	3.80%	0.00%	16.70%	0.00%	16.70%
Marion C Seltzer Elementary School	32.00%	24.00%	36.40%	48.50%	35.70%	7.10%	14.30%	16.70%	6.70%	13.60%	2.30%	16.70%	6.70%	40.00%
Northeast Ohio College Preparatory School	39.10%	34.80%	28.60%	14.30%	33.30%	6.70%	33.30%	14.30%	28.60%	35.00%	47.40%	26.10%	43.50%	39.10%
Scranton School	40.50%	45.90%	33.30%	45.80%	50.00%	33.30%	41.70%	18.60%	16.30%	42.90%	26.80%	29.40%	35.30%	41.20%
Tremont Montessori School	37.00%	29.60%	35.70%	17.90%	66.70%	33.30%	33.30%	32.00%	12.00%	36.80%	15.80%	25.00%	19.40%	31.30%
Village Preparatory School Willard	49.10%	43.90%	48.20%	62.50%	49.00%	20.00%	36.00%	34.70%	8.20%	48.80%	48.80%	15.40%	17.90%	35.90%
Waverly Elementary School	31.80%	36.40%	24.30%	35.10%	17.60%	5.90%	11.80%	12.50%	4.20%	5.30%	5.30%	30.00%	15.00%	50.00%
Village Preparatory School Cliffs	36.80%	35.10%	30.30%	31.80%	35.70%	17.10%	32.90%	31.10%	34.40%	61.50%	51.90%	45.60%	59.60%	60.70%

Coversheet

State Test Comparisons

Section: X. Education Advisory Council
Item: B. State Test Comparisons
Purpose:
Submitted by:
Related Material: NW Report Card.pdf
TIS Report Card.pdf
Board Ed 10-23-2024.pptx



School Home

Principal
April M. Maimone
 Phone
(216) 961-4308

Address
3805 Terrett Ave
Cleveland, OH 44113-2847

Sponsor
Cleveland Municipal

Career Technical Planning District
Cleveland Municipal CTPD (ctpd/overview/200019)

Directory information current as of the 2023-2024 Report Card publication date.

Achievement

This component represents whether student performance on state tests met established thresholds and how well students performed on tests overall.

★★★☆☆

Meets state standards in academic achievement.

Progress

This component looks closely at the growth all students are making based on their past performances.

★★★★☆

Significant evidence that the school exceeded student growth expectations.

Gap Closing

The Gap Closing Component is a measure of the reduction in educational gaps for student groups.

★★★★★

Significantly exceeds state standards in closing educational gaps

Performance Index
79.3%

Graduation

The Graduation Component is a measure of the four-year adjusted cohort graduation rate and the five-year adjusted cohort graduation rate.

★★★★★

Value-Added
NR

Early Literacy

The Early Literacy Component is a measure of reading improvement and proficiency for students in kindergarten through third grade.

★★★★☆

Exceeds state standards in early literacy (K-3)

Annual Performance Goals
4063.0%

College, Career, Workforce and Military Readiness

This component looks at how well-prepared Ohio's students are for future opportunities, whether training in a technical field or preparing for work or college.

50


Graduation Rates

0.0% of students graduated in 4 years
0.0% of students graduated in 5 years

Early Literacy


86.3%

40




Special Education Profiles
Link to Profile Reports on IDEA Indicators

(<https://www.edresourcesohio.org/oec/publicProfileSummary.php>)




Financial Data
School and District Spending and Source of Funds Data




Report Card Overview
Ohio School Report Card Results

(</school/overview/012030>)



National Assessment of Education Progress in Ohio
Link to Ohio's NAEP Snapshot

(<https://education.ohio.gov/Topics/Testing/National-and-International-Testing/National-Assessment-of-Educational-Progress-in-Ohio>)



Student Opportunity Profile
Student Opportunity Profile

(</school/profile/012030>)

Your School's Students

<u>Enrollment</u>	213	
<u>Chronic Absenteeism Rate</u>	27.2%	
<u>4-Year Graduation Rate</u>	NC	<u>Grades Served</u>
		K-8

Number of Recently Arrived English Learner Students (excluded from accountability for two years):--



School Home

Principal
Aziz Ahmad
 Phone
(216) 721-0120

Address
**11327 Shaker Blvd Ste 200 E.
 Cleveland, OH 44104-3805**

Sponsor
ESC of Lake Erie West

Career Technical Planning District
Cleveland Municipal CTPD (ctpd/overview/200019)

Directory information current as of the 2023-2024 Report Card publication date.

Achievement

This component represents whether student performance on state tests met established thresholds and how well students performed on tests overall.

★★☆☆☆

Needs support to meet state standards in academic achievement.

Progress

This component looks closely at the growth all students are making based on their past performances.

★★☆☆☆

Significant evidence that the school fell short of student growth expectations.

Gap Closing

The Gap Closing Component is a measure of the reduction in educational gaps for student groups.

★☆☆☆☆

Needs significant support to meet state standards in closing educational gaps.

Performance Index
53.6%

Graduation

The Graduation Component is a measure of the four-year adjusted cohort graduation rate and the five-year adjusted cohort graduation rate.

★★★★☆

Value-Added
NR Overall

Early Literacy

The Early Literacy Component is a measure of reading improvement and proficiency for students in kindergarten through third grade.

★★☆☆☆

Needs support to meet state standards in early literacy (K-3).

Annual Performance Goals
209.5%

College, Career, Workforce and Military Readiness

This component looks at how well-prepared Ohio's students are for future opportunities, whether training in a technical field or preparing for work or college.

10


Graduation Rates

0.0% of students graduated in 4 years
0.0% of students graduated in 5 years

Early Literacy


61.8%

20




Special Education Profiles
Link to Profile Reports on IDEA Indicators

(<https://www.edresourcesohio.org/oec/publicProfileSummary.php>)




Financial Data
School and District Spending and Source of Funds Data




Report Card Overview
Ohio School Report Card Results

(</school/overview/133215>)



National Assessment of Education Progress in Ohio
Link to Ohio's NAEP Snapshot

(<https://education.ohio.gov/Topics/Testing/National-and-International-Testing/National-Assessment-of-Educational-Progress-in-Ohio>)



Student Opportunity Profile
Student Opportunity Profile

(</school/profile/133215>)

Your School's Students

<u>Enrollment</u>	205	
<u>Chronic Absenteeism Rate</u>	40.6%	<u>4-Year Graduation Rate</u>
		NC
		<u>Grades Served</u>
		K-8

Number of Recently Arrived English Learner Students (excluded from accountability for two years):--

Sponsor Evaluation

Non-Academic Sponsor Measures

		Sponsor CMSD (NW)	Sponsor ESCLEW (TIS)	Our Own Strategic Plan Indicators
Financials		(45/150 points)		
Current Year Enrollment Variance from Budgeted Enrollment	Monthly	X	X	X
Enrollment Sustainment throughout school year (FTE beg of yr to end of yr)	Monthly		X	X
Sustainability Year to Year (Student Retention from Oct to Oct)	Oct		X	X Beg to End Yr
Ratio of Assets to Liabilities	Monthly Statements	X	X	
Unrestricted Days of Cash		X	X	
Debt management		X	X	
Total Expense Variance from Budget		X	X	
Change in Net Assets		X	X	
Sponsor financial reporting submitted on time each month		X	X	
Audit Findings		Yearly	X	X
Annual 5-Year Forecasts and Budgets Submitted	Bi-annually	X	X	
Governance				
Board Engagement: attend 2+ school events	End of year		X	
Hold 6 board meetings/year	End of year	X	X	
At least 5 Board members	End of year	X	X	
Proper meeting notice	Ongoing	X	X	
Board member attendance for meetings	Ongoing	X	X	
Organizational/Legal/Compliance		(45/150 points)		
<i>(List of over 200 ORC compliance items that are collected and documented at various months through the year or monthly)</i>				
On-time records submission of ORC required items	monthly	X	X	
Accuracy of records submission of ORC required items	monthly	X	X	
Annual Report submission	Oct	X	X	
Emergency Management Plan submission	Aug	X	X	
Student Discipline K-3 HB 318	ongoing	X	X	
Student Discipline 4-8		X	X	
Special Education policies and practices		X	X	
Health & Safety		X	X	
Staffing & Employment		X	X	
Governance (including meetings, practices and trainings)		X	X	
Admissions, Enrollment and Attendance		X	X	
Education Program		X	X	
Fiscal		X	X	
Other		X	X	
Mission-specific goal written into Amendment 11.6 of contract			X	

Over 200 items annually

Academic & Educational Measures

		Sponsor CMSD (NW)	Sponsor ESCLEW (TIS)	Our Own Strategic Plan Indicators	
Ohio State Test Report Card		(50/150 points)			
Overall Rating (1-5 stars)	Spring tests taken in ELA, Math, Science in April	X	X		
Achievement (1-5 stars)		X	X		
-ELA and Math Achievement and Growth Indicators* (% met)		X			
Performance Index* (%) measures every test taken by every student at every level		X	X		
-Compare PI to 2 Similar Schools			X		
Progress/Growth (1-5 stars) did students make 1 year's growth since prior year (<,>)		X	X		
Gap Closing (1-5 stars) Looks at PI by all subgroups (SpEd, Econ Dis, Race)		X	X		
Early Literacy (1-5 stars)		Results out Aug/Sept following year	X	X	
-3 rd Grade Proficiency (%)				X	
-Promotion to 4 th Grade (%)				X	
-Imp K-3 Lit (RIMPS %) how many were on a plan and improved?			X		
Comparison to Peer Group for each of the above Report Card Indicators		X			
Attendance/Chronic Absenteeism (%)	End of year	X	X		
Nationally Normed Assessments NWEA MAP Tests					
Reading Achievement performance on grade level (%)	Taken in Aug/Sept, Jan, May		X	x	
Math Achievement performance on grade level (%)			X	x	
Reading Growth (% of students growing 1 year from beginning to end of year)			X	X goal is 50%-ile	
Math Growth (% of students growing 1 year from beginning to end of year)			X	X goal is 50%-ile	
Reading OR Math Growth (%)			X		
Subgroup: Students w/Disabilities Growth			X		
High Quality Teaching & Learning in the Intergenerational Model					
PBIS-do we have a positive behavior intervention system in place (Yes/No)			X		

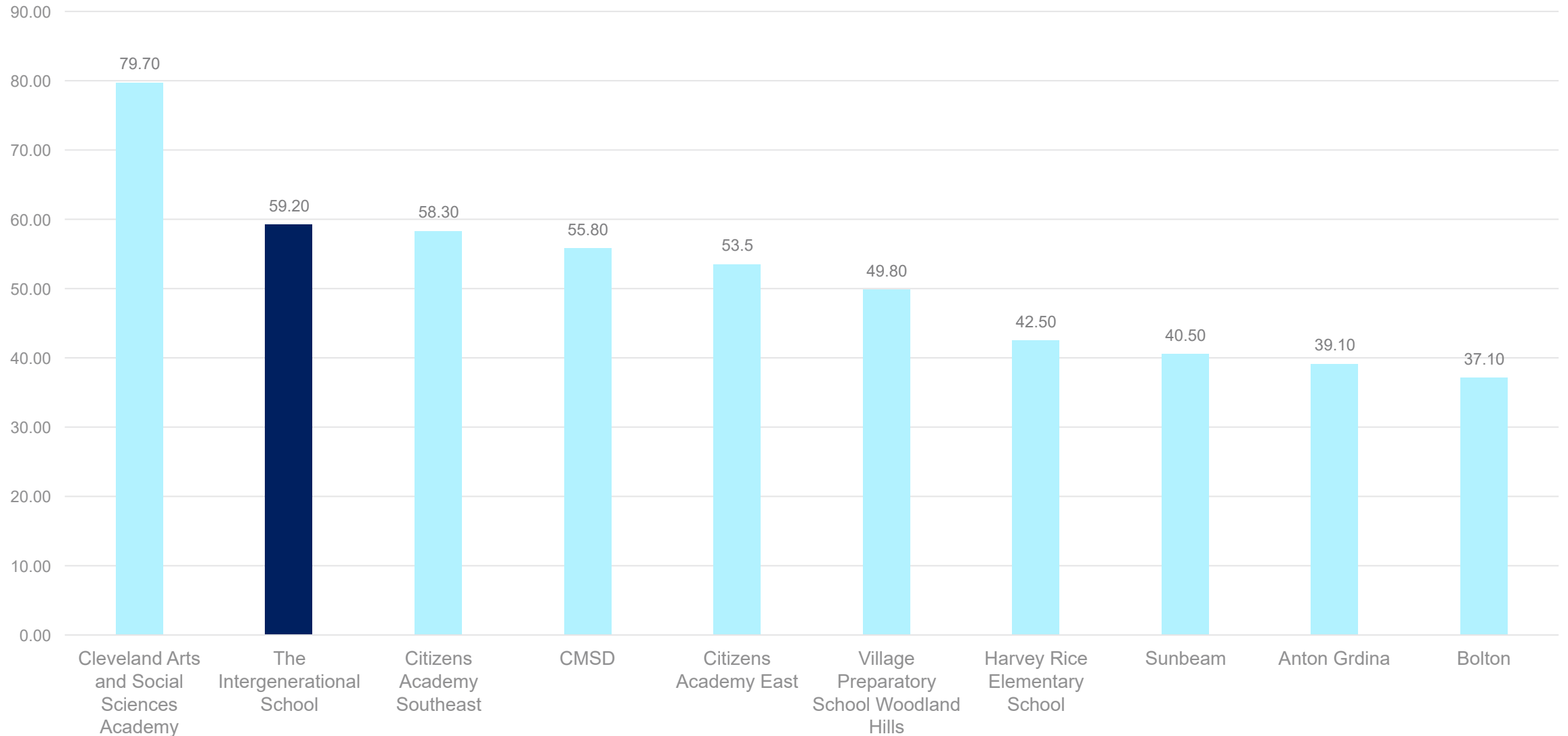
Academic & Educational Measures

		Sponsor CMSD (NW)	Sponsor ESCLEW (TIS)	Our Own Strategic Plan Indicators	
Ohio State Test Report Card		(50/150 points)			
Overall Rating (1-5 stars)	Spring tests taken in ELA, Math, Science in April	X	X		
Achievement (1-5 stars)		X	X		
-ELA and Math Achievement and Growth Indicators* (% met)		X			
Performance Index* (%) measures every test taken by every student at every level		X	X		
-Compare PI to 2 Similar Schools			X		
Progress/Growth (1-5 stars) did students make 1 year's growth since prior year (<,>)		X	X		
Gap Closing (1-5 stars) Looks at PI by all subgroups (SpEd, Econ Dis, Race)		X	X		
Early Literacy (1-5 stars)		Results out Aug/Sept following year	X	X	
-3 rd Grade Proficiency (%)				X	
-Promotion to 4 th Grade (%)				X	
-Imp K-3 Lit (RIMPS %) how many were on a plan and improved?			X		
Comparison to Peer Group for each of the above Report Card Indicators		X			
Attendance/Chronic Absenteeism (%)	End of year	X	X		
Nationally Normed Assessments NWEA MAP Tests					
Reading Achievement performance on grade level (%)	Taken in Aug/Sept, Jan, May		X	x	
Math Achievement performance on grade level (%)			X	x	
Reading Growth (% of students growing 1 year from beginning to end of year)			X	X goal is 50%-ile	
Math Growth (% of students growing 1 year from beginning to end of year)			X	X goal is 50%-ile	
Reading OR Math Growth (%)			X		
Subgroup: Students w/Disabilities Growth				X	
High Quality Teaching & Learning in the Intergenerational Model					
PBIS-do we have a positive behavior intervention system in place (Yes/No)			X		

Spring OST Comparisons

	School Name	Overall	Progress	Gap Closing	Early Literacy	Achievement	PI Score
	The Intergenerational School	2.00	2.00	1.00	2.00	2.00	59.20
CMSD	Anton Grdina	2.00	2.00	2.00	1.00	1.00	39.10
CMSD	Bolton	2.50	3.00	2.00	1.00	1.00	37.10
Breakthrough Charter	Citizens Academy East	3.00	4.00	3.00	1.00	2.00	53.5
Breakthrough Charter	Citizens Academy Southeast	3.00	4.00	3.00	1.00	2.00	58.30
Charter	Cleveland Arts and Social Sciences Academy	4.00	4.00	5.00	2.00	3.00	79.70
CMSD	CMSD	3.00	4.00	3.00	1.00	2.00	55.80
CMSD	Harvey Rice Elementary School	2.50	3.00	2.00	1.00	1.00	42.50
CMSD	Sunbeam	2.50	3.00	3.00	1.00	1.00	40.50
Breakthrough Charter	Village Preparatory School Woodland Hills	2.00	3.00	1.00	1.00	1.00	49.80

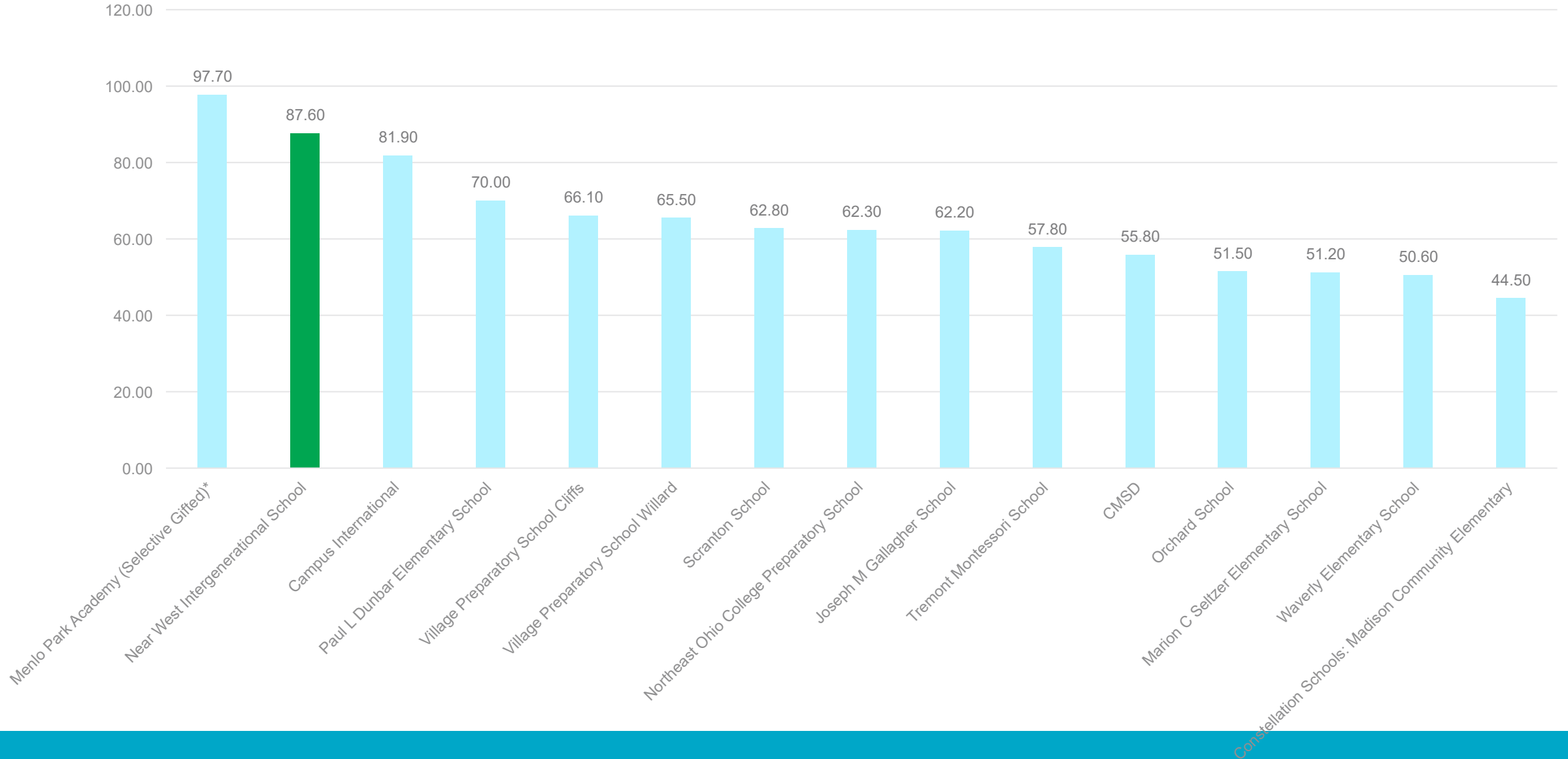
TIS-East Neighborhood Public Schools Achievement: Performance Index



School Name	3rd Grade ELA 2024	3rd Grade Math 2024	4th Grade ELA 2024	4th Grade Math 2024	5th Grade ELA 2024	5th Grade Math 2024	5th Grade Science 2024	6th Grade ELA 2024	6th Grade Math 2024	7th Grade ELA 2024	7th Grade Math 2024	8th Grade ELA 2024	8th Grade Math 2024	8th Grade Science 2024
The Intergenerational School	31.80%	18.20%	35.70%	21.40%	76.20%	19.00%	23.80%	42.10%	10.50%	59.30%	25.90%	21.70%	17.40%	21.70%
Anton Grdina	19.20%	3.80%	12.50%	0.00%	16.00%	12.00%	12.00%	0.00%	0.00%	7.10%	3.60%	11.10%	5.60%	16.70%
Bolton	11.80%	11.80%	19.00%	9.50%	27.30%	0.00%	9.10%	7.10%	0.00%	9.10%	0.00%	0.00%	0.00%	0.00%
Citizens Academy East	37.10%	39.70%	33.80%	23.90%	36.60%	9.90%	36.60%	41.30%	16.00%	33.90%	22.00%	31.40%	24.30%	34.30%
Citizens Academy Southeast	37.10%	39.70%	33.80%	23.90%	36.60%	9.90%	36.60%	41.30%	16.00%	33.90%	22.00%	31.40%	24.30%	34.30%
Cleveland Arts and Social Sciences Academy	45.20%	64.50%	48.10%	66.70%	41.70%	75.00%	45.80%	54.30%	45.70%	62.50%	57.50%	20.00%	80.00%	88.00%
CMSD	35.30%	32.00%	33.50%	29.30%	37.90%	20.60%	24.00%	21.90%	16.10%	32.30%	20.30%	21.00%	19.30%	28.60%
Harvey Rice Elementary School	26.70%	7.10%	22.90%	12.80%	11.40%	0.00%	0.00%	10.20%	2.00%	14.00%	6.00%	10.80%	15.80%	13.20%
Sunbeam	25.60%	11.60%	10.30%	5.00%	14.60%	0.00%	4.90%	12.10%	0.00%	12.50%	0.00%	9.10%	9.10%	15.20%
Village Preparatory School Woodland Hills	17.70%	14.50%	31.30%	14.10%	17.50%	16.10%	11.10%	26.90%	9.60%	26.50%	14.30%	13.20%	5.70%	32.10%

	School Name	Overall	Progress	Gap Closing	Early Literacy	Achievement	PI Score
	Near West Intergenerational School	4.50	4.00	5.00	4.00	3.00	87.60
	CMSD	3.00	4.00	3.00	1.00	2.00	55.80
district	Joseph M Gallagher School	3.50	5.00	3.00	1.00	2.00	62.20
charter	Menlo Park Academy (Selective Gifted)*	3.50	1.00	4.00	5.00	4.00	97.70
district	Orchard School	2.50	3.00	2.00	1.00	1.00	51.50
district	Paul L Dunbar Elementary School	3.50	5.00	4.00	1.00	2.00	70.00
district	Campus International	4.00	3.00	5.00	4.00	3.00	81.90
charter	Constellation Schools: Madison Community Elementary	2.00	3.00	1.00	1.00	1.00	44.50
district	Marion C Seltzer Elementary School	2.00	3.00	1.00	1.00	1.00	51.20
charter	Northeast Ohio College Preparatory School	3.00	4.00	2.00	1.00	2.00	62.30
district	Scranton School	3.50	5.00	4.00	2.00	2.00	62.80
district	Tremont Montessori School	3.00	3.00	4.00	1.00	2.00	57.80
Breakthrough charter	Village Preparatory School Willard	3.00	3.00	5.00	1.00	2.00	65.50
district	Waverly Elementary School	2.50	3.00	2.00	1.00	1.00	50.60
Breakthrough charter	Village Preparatory School Cliffs	4.00	5.00	5.00	1.00	2.00	66.10

Near West Neighborhood Public Schools Achievement: Performance Index



School Name	3rd Grade ELA 2024	3rd Grade Math 2024	4th Grade ELA 2024	4th Grade Math 2024	5th Grade ELA 2024	5th Grade Math 2024	5th Grade Science 2024	6th Grade ELA 2024	6th Grade Math 2024	7th Grade ELA 2024	7th Grade Math 2024	8th Grade ELA 2024	8th Grade Math 2024	8th Grade Science 2024
Near West Intergenerational School	83.30%	66.70%	75.00%	70.80%	66.70%	62.50%	75.00%	66.70%	42.90%	78.60%	71.40%	44.40%	55.60%	77.80%
CMSD	35.30%	32.00%	33.50%	29.30%	37.90%	20.60%	24.00%	21.90%	16.10%	32.30%	20.30%	21.00%	19.30%	28.60%
Joseph M Gallagher School	38.50%	47.70%	27.80%	38.90%	32.80%	26.20%	32.80%	32.50%	20.80%	54.10%	26.20%	27.60%	17.20%	42.10%
Menlo Park Academy (Selective Gifted)*	88.50%	81.80%	90.00%	62.20%	91.40%	40.00%	77.10%	78.80%	63.60%	93.20%	73.50%	n/a	n/a	n/a
Orchard School	27.10%	27.10%	20.50%	25.00%	31.30%	6.30%	8.30%	14.80%	11.10%	3390.00%	14.30%	21.70%	12.90%	26.10%
Paul L Dunbar Elementary School	33.30%	63.30%	22.20%	31.10%	35.70%	35.70%	14.30%	42.90%	82.10%	39.00%	87.80%	25.00%	95.80%	25.00%
Campus International	74.70%	74.30%	75.30%	67.10%	68.40%	42.30%	40.50%	47.80%	35.70%	63.00%	34.70%	68.10%	15.20%	63.80%
Constellation Schools: Madison Community Elementary	26.70%	6.70%	33.30%	16.70%	18.80%	12.50%	12.50%	16.70%	11.10%	3.80%	0.00%	16.70%	0.00%	16.70%
Marion C Seltzer Elementary School	32.00%	24.00%	36.40%	48.50%	35.70%	7.10%	14.30%	16.70%	6.70%	13.60%	2.30%	16.70%	6.70%	40.00%
Northeast Ohio College Preparatory School	39.10%	34.80%	28.60%	14.30%	33.30%	6.70%	33.30%	14.30%	28.60%	35.00%	47.40%	26.10%	43.50%	39.10%
Scranton School	40.50%	45.90%	33.30%	45.80%	50.00%	33.30%	41.70%	18.60%	16.30%	42.90%	26.80%	29.40%	35.30%	41.20%
Tremont Montessori School	37.00%	29.60%	35.70%	17.90%	66.70%	33.30%	33.30%	32.00%	12.00%	36.80%	15.80%	25.00%	19.40%	31.30%
Village Preparatory School Willard	49.10%	43.90%	48.20%	62.50%	49.00%	20.00%	36.00%	34.70%	8.20%	48.80%	48.80%	15.40%	17.90%	35.90%
Waverly Elementary School	31.80%	36.40%	24.30%	35.10%	17.60%	5.90%	11.80%	12.50%	4.20%	5.30%	5.30%	30.00%	15.00%	50.00%
Village Preparatory School Cliffs	36.80%	35.10%	30.30%	31.80%	35.70%	17.10%	32.90%	31.10%	34.40%	61.50%	51.90%	45.60%	59.60%	60.70%

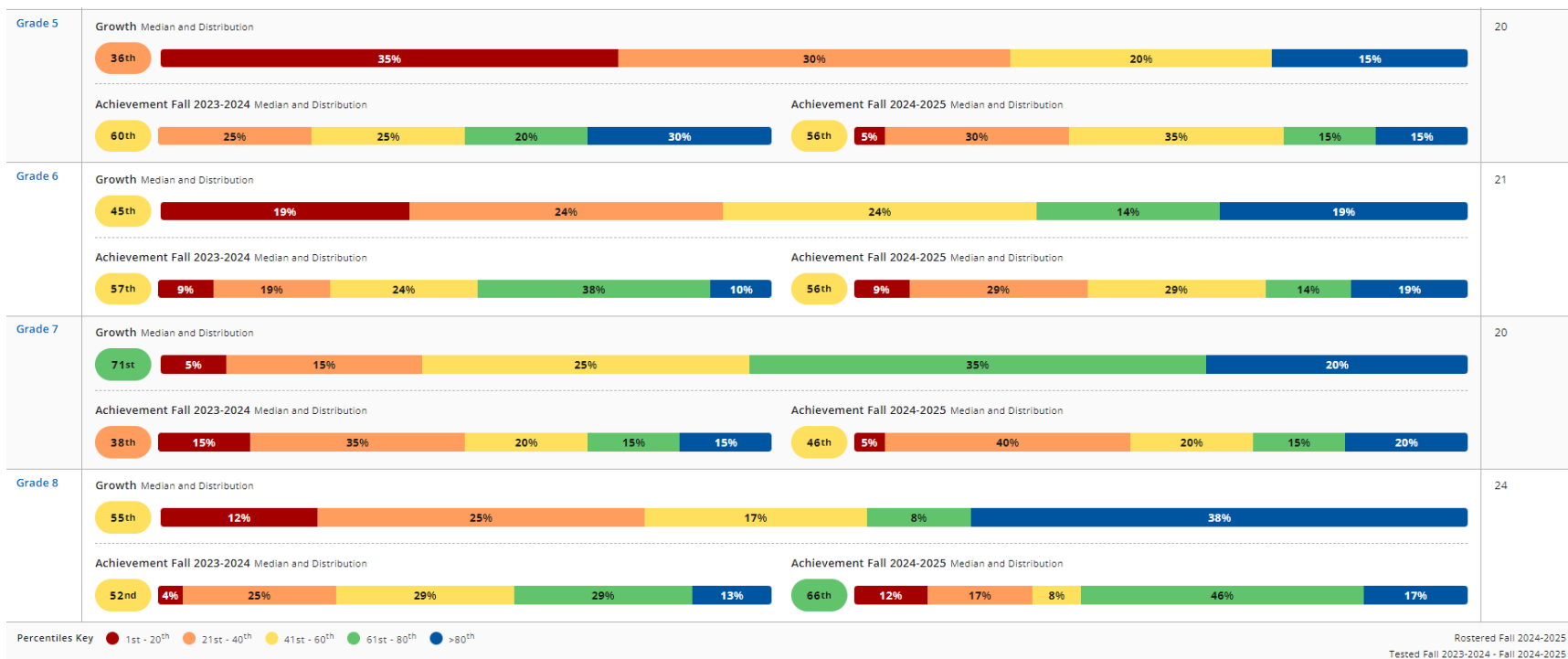
Coversheet

Fall NWEA Scores

Section: X. Education Advisory Council
Item: C. Fall NWEA Scores
Purpose:
Submitted by:
Related Material: MAP Data 2024 October (1).pdf

NWIS Growth and Achievement- Math, Reading (respectively)

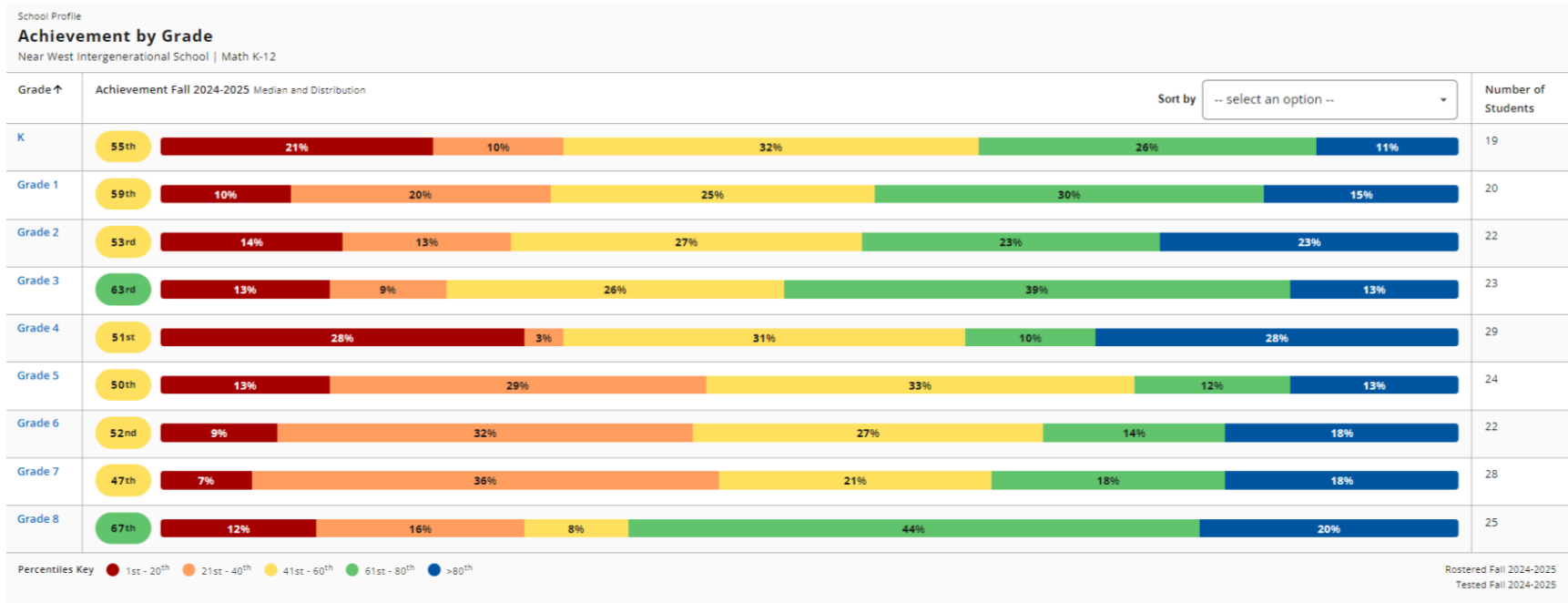
School Profile		Growth and Achievement by Grade	
Near West Intergenerational School Math K-12			
Grade ↑		Sort by -- select an option --	Number of Students ¹
Grade 1	Growth Median and Distribution	27th	31% 31% 25% 6% 7%
	Achievement Fall 2023-2024 Median and Distribution	74th	6% 6% 19% 38% 31%
	Achievement Fall 2024-2025 Median and Distribution	62nd	6% 19% 25% 31% 19%
Grade 2	Growth Median and Distribution	34th	17% 39% 5% 11% 28%
	Achievement Fall 2023-2024 Median and Distribution	61st	11% 17% 22% 22% 28%
	Achievement Fall 2024-2025 Median and Distribution	66th	11% 11% 22% 28% 28%
Grade 3	Growth Median and Distribution	39th	32% 18% 32% 4% 14%
	Achievement Fall 2023-2024 Median and Distribution	72nd	5% 23% 54% 18%
	Achievement Fall 2024-2025 Median and Distribution	63rd	13% 9% 23% 41% 14%
Grade 4	Growth Median and Distribution	72nd	13% 13% 17% 22% 35%
	Achievement Fall 2023-2024 Median and Distribution	52nd	22% 22% 22% 21% 13%
	Achievement Fall 2024-2025 Median and Distribution	54th	22% 4% 30% 13% 31%

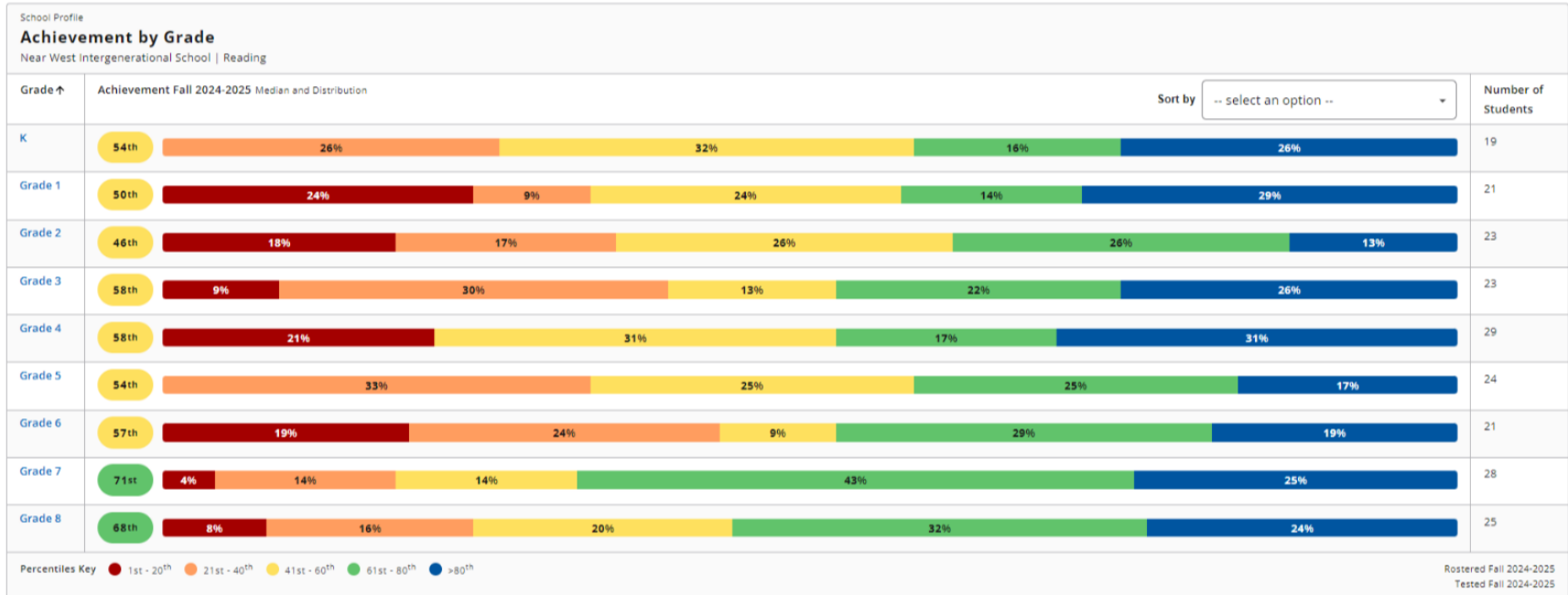


School Profile		Growth and Achievement by Grade	
Near West Intergenerational School Reading			
Grade ↑		Sort by -- select an option --	Number of Students 1
Grade 1	Growth Median and Distribution	24th	35% 29% 12% 6% 18%
	Achievement Fall 2023-2024 Median and Distribution	61st	6% 35% 35% 24%
Grade 2	Growth Median and Distribution	26th	42% 27% 21% 5% 5%
	Achievement Fall 2023-2024 Median and Distribution	68th	16% 5% 16% 31% 32%
Grade 3	Growth Median and Distribution	45th	27% 14% 32% 23% 4%
	Achievement Fall 2023-2024 Median and Distribution	65th	4% 9% 32% 23% 32%
Grade 4	Growth Median and Distribution	86th	22% 4% 4% 18% 52%
	Achievement Fall 2023-2024 Median and Distribution	49th	8% 35% 13% 22% 22%
	Achievement Fall 2024-2025 Median and Distribution	62nd	17% 26% 22% 35%

School Profile		Growth and Achievement by Grade	
Near West Intergenerational School Reading			
Grade ↑		Sort by -- select an option --	Number of Students 1
Grade 1	Growth Median and Distribution	24th	35% 29% 12% 6% 18%
	Achievement Fall 2023-2024 Median and Distribution	61st	6% 35% 35% 24%
Grade 2	Growth Median and Distribution	26th	42% 27% 21% 5% 5%
	Achievement Fall 2023-2024 Median and Distribution	68th	16% 5% 16% 31% 32%
Grade 3	Growth Median and Distribution	45th	27% 14% 32% 23% 4%
	Achievement Fall 2023-2024 Median and Distribution	65th	4% 9% 32% 23% 32%
Grade 4	Growth Median and Distribution	86th	22% 4% 4% 18% 52%
	Achievement Fall 2023-2024 Median and Distribution	49th	8% 35% 13% 22% 22%
	Achievement Fall 2024-2025 Median and Distribution	62nd	17% 26% 22% 35%

Growth ONLY- Math, Reading (respectively)



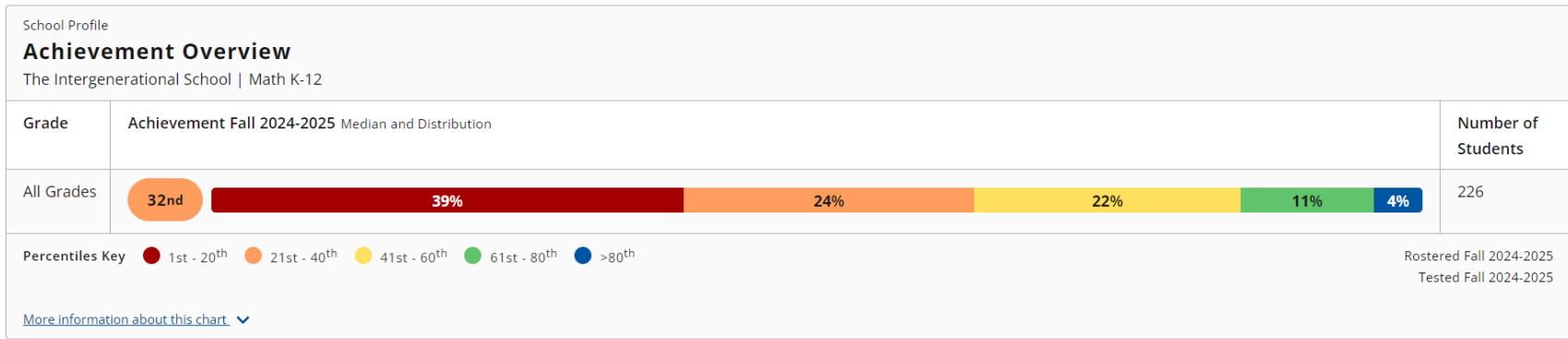


TIS 2024-2024 Fall Academic Data

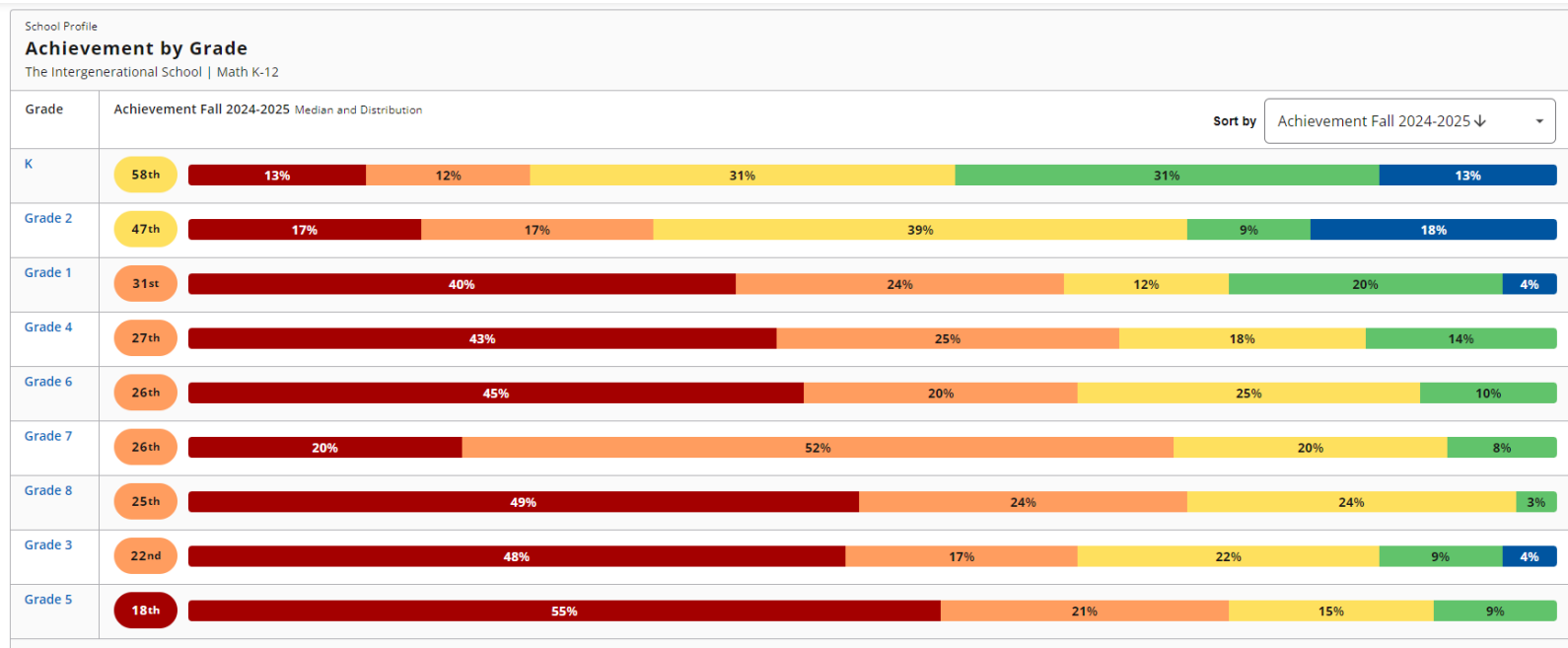
Math

Fall 2024 Achievement

The Intergenerational School

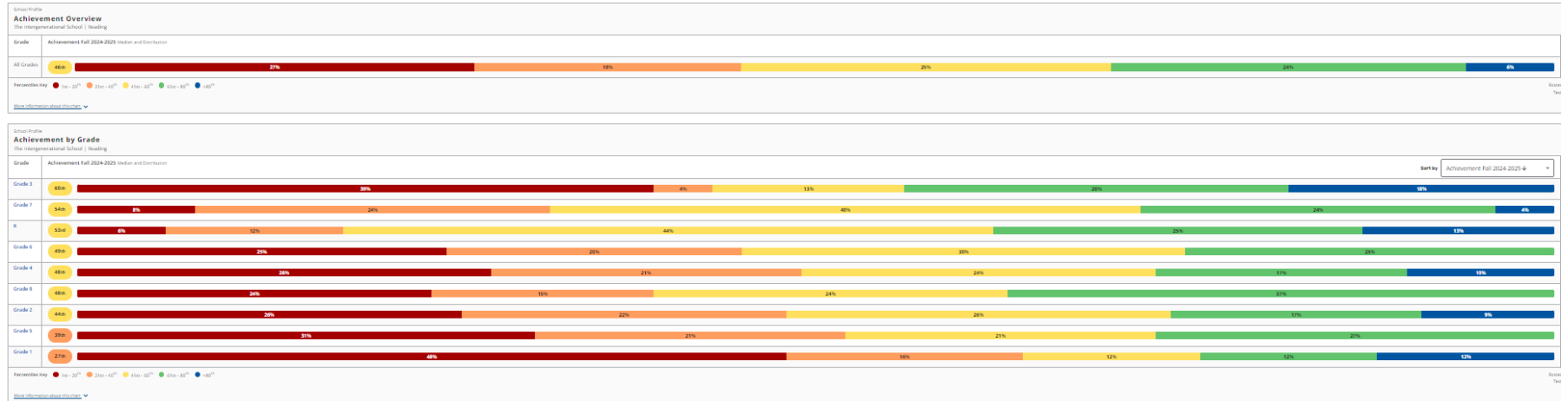


Fall 2023 – Fall 2024 Growth



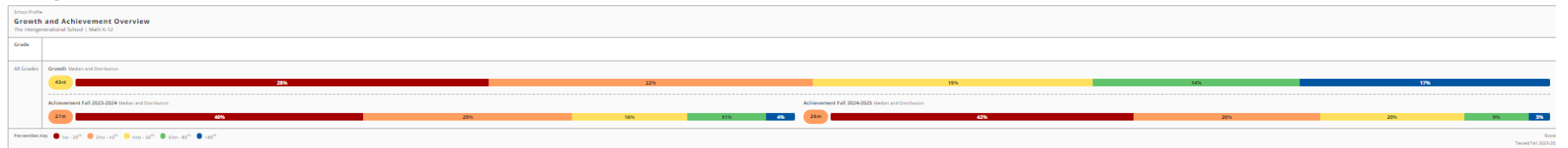
Fall Reading Achievement Data

The Intergenerational School



Fall 2023 – 2024 Growth Data

The Intergenerational School



Fall 2023 – 2024 Growth Data



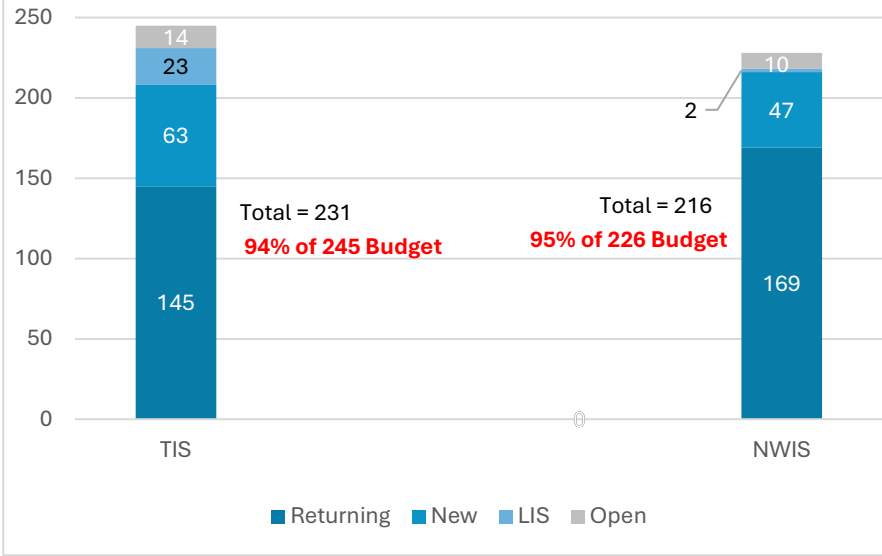
Coversheet

Enrollment Dashboard

Section: X. Education Advisory Council
Item: D. Enrollment Dashboard
Purpose:
Submitted by:
Related Material: October 2024 Enrollment Dashboard.pdf

October 2024 Enrollment Dashboard

Current Enrollment



	No Shows	WD's	In-Year Retention
TIS	32	0	100%
NWIS	14	3	99%
Model	46	3	100%

Year to Year Retention Oct 19-Oct 24

