

Oregon Trail Arthur Academy

1. Abstract of Project and Project Goals

A. The **Oregon Trail Arthur Academy Public Charter School** (OTAA) will be a small k-5 school of 150 students in the Oregon Trail school district. The establishment of this school has been driven by a group of parents who want this school and have been working for over a year to build up interest. A charter application was submitted to the Oregon Trail School District on January 26, 2009 in cooperation with this group.

The vision is to offer an academically focused school with a unique set of specialized instructional programs that utilize an approach to teaching not currently offered by the sponsoring district. An incremental/mastery approach is used to build a strong foundation in reading, math and language skills. Additionally, the Core Knowledge curriculum is used to teach broader subjects of history, geography, science, and social science as well as additional experiences in literature, music and art.

The Oregon Trail Arthur Academy will be a part of a group of six Arthur Academy (AA) charter schools in the Portland area with the same vision.

B. **The primary and ultimate Goal** will always be to accelerate educational achievement and academic competency of all our students, as measured by state and national standardized tests, within a friendly and accepting environment. The more **immediate goals** are: 1) to further develop a parent support group and obtain sufficient enrollment applications for initial k-2 classrooms, 2) gain district approval, 3) recruit and develop school staff, 4) purchase materials and equipment, and 5) obtain adequate facility and playground space in order to open in September 2009.

Currently, Arthur Academy schools are located in the following school districts: (listed in the order in which they were opened) David Douglas, Reynolds, Woodburn, Portland, Gresham-Barlow and St. Helens. In the fall of 2008, 875 students were enrolled in 37 classrooms in these 6 schools.

The student achievement goals will be measured during the Implementation and Continuation phases in the fall and spring with national tests for all grades and in the spring with state assessments for grades 3 thru 5. Work towards forming a parent support group (1) has begun and will continue during the Planning phase, as well as during phase 2 and 3. Obtaining sufficient student applications for three classrooms will begin in April 2009 and will continue until school opening in September 2009 if necessary. This process will be repeated each year, during the Implementation and Continuation phases, until all six classrooms will be filled. An application for charter (2) was submitted to the Oregon Trail SD on January 26, 2009. The first hearing is scheduled for April 13, 2009. An experienced Arthur Academy school teacher/manager (3) and an experienced AA teacher and teaching assistant have been recruited. Further recruiting for opening will begin in April 2009. In phases 2 and 3, recruiting of staff will continue until the school is filled with all k-5 classrooms.

Purchasing of materials (4) and equipment will take place in the summer months during the Planning phase and will be repeated each year as new classrooms are added. A promising location (5) has been found. Further plans and work on the facility will continue until the opening of school and will also continue each year as the school grows.

2. Purpose of School

A. **Increase Student Learning and Achievement**. The Arthur Academy Charter Schools are driven by our instructional model, which defines our charter school option, attracts students, and motivates teachers to work at our schools. We believe that academic learning, by itself, can be highly motivating to young children, if taught directly and carefully, right from kindergarten.

Our instructional model is guided by our belief that all children can learn and be successful if provided (a) well-designed, well-researched, and comprehensive lessons and materials; (b) lessons in foundational subjects that are constructed with small, incremental teaching progressions (from simple to complex) mastered as students progress; (c) lessons that broaden a child's knowledge base; (d) detailed and well-researched teaching practices that are clearly defined and prescribed to produce mastery from start to finish; and (e) skillful, motivating and inspiring teachers.

The reading program is the hallmark of our school, stated by our motto, "Everybody Reads." We expect every kindergarten student to read above grade level by year-end, and any higher-grade student entering the Academy below average will begin a catch-up program to strengthen his reading skills to grade level and better.

The programs have a specific sequential design, but not all children are at the same learning progression. Therefore, we make sure each child is placed within the programs where the difficulty level matches the individual child's learning progression, which enables every student to succeed every day and achieve the learning objectives.

The DI reading program's effectiveness is verified by recent reports [National Research Council (1998); the National Reading Panel (2000)]. Bonnie Grossen, Ph.D., published in 1999 a thorough review of the reading program's research basis.

Arthur Academies' Experience with Student Achievement. Last year, 655 students attended our schools in 29 K-5 classrooms for the full year. The SAT-10 reading achievement scores showed that 37% of the students started the year performing below average. By the end of the year, only 13% scored below average. At the beginning of the year, 20% of the students scored in the top 20th percentile. By the end of the year, 51% scored in the top 20th percentile. Five of the six schools averaged 10 percentage points above the state average in percent of students meeting the reading and math benchmarks.

B. Increase choices. Neither the Arthur Academy instructional model nor the small school environment is available in the Oregon Trail district elementary schools. Evidence of the Arthur Academy's attractiveness as a choice includes enrollment success for all six schools; waiting lists; retention figures (an overall return rate of 90% and a kindergarten return rate over 95%); and parent satisfaction (our yearly parent survey showed 98% were at least "satisfied" and 86% were "highly satisfied"). Historically, we have been able to draw students in to our schools, and therefore our sponsoring district, from private as well as home schooling situations.

C. Meeting Individual Student Academic Needs and Interests. Arthur Academies meet the needs of a wide diversity of students, including low-performing students, high-performing students, those from low-income families, and those from homes where English is not the first language. Our greatest concern is to take students who enter school performing below average (no matter what the reasons), and improve their rate of progress. This is done without sacrificing progress among higher performing students.

E. Different and Innovative Learning Methods. As previously stated, the instructional model used by the Academy is an incremental/mastery approach to building a strong foundation which is highly researched and validated, yet is rarely used in schools, and to our knowledge is not used in any Oregon Trail district elementary school. OTAA would bring this different and innovative choice to Oregon Trail families. The major innovations OTAA would bring include the design of the curriculum materials, teaching strategies and classroom management, unique language programs, and an academic kindergarten program. These will be further described in this proposal.

F. Opportunities in a Small Learning Environment. OTAA would begin at K-2 (75 students) and expand over three years to K-5 (one class per grade), with 150 students. The six existing Oregon Trail elementary schools averaged 300 students in 2007-08. OTAA, at maximum size, would be about half that average and will present an opportunity for families seeking a small school.

H. Establish Additional Forms of Accountability. In addition to state assessments, we use group (SAT) and individual (WRMT) standardized tests in reading, spelling and math. We test all students every fall and spring to measure gains made during the year. We report results to parents and sponsoring districts, and typically charter contracts contain performance standards we must meet. Parents also receive curriculum-based formative evaluations throughout the year to help track their child's progress. Quarterly summaries are compiled to provide formative measures of Mastery and Progress goals throughout the year that enable teachers to make adjustments in instruction during the year.

3. Demographics/Need

A. Community; Local Schools. The Oregon Trail District has 4200 students with six elementary schools, three middle schools and one high school. It serves the Sandy, Boring and Mt. Hood communities. It is a commercial center of a rural area with a population of approximately 20,000. Although commercial and residential development has taken place over the past 10 years (over 225 new residences alone) the overall district enrollment has generally remained the same. The city of Sandy has experienced an 82% increase in population since 1990. A recent bond issue was passed to construct a new high school. The six elementary schools average 300 students and range from 140 to 470 in enrollment.

B. Student Demographics. In the Oregon Trail School District, about 30% of students come from economically disadvantaged homes and 17% from minority families.

All schools face the challenges of teaching children from economically disadvantaged backgrounds and those from non-English speaking homes. Not all children from such families have learning problems. For us, more important than identifying students from various social, economic, or language categories is identifying and serving all children who come to school behind their peers or with learning problems, for whatever reason. Arthur Academies have shown their ability to serve these children by significantly raising their achievement each year. We expect that this will continue to occur at OTAA.

C. Demonstrate Sufficient Need. Sufficient need as to the community and local schools is demonstrated, in our view, by the district's size (the district's average

elementary school size is twice our maximum size) and over 50 families that have demonstrated interest in the school before any recruiting program has occurred.

Needs relating to the student population is not dramatic. The students achievement scores on the state tests, which are an indication of how well low-performing students achieve, are very close to state averages of percent that meets or exceeds standards. The percent that meets or exceeds in reading in grades 3-5 was 79 compared to the state average of 80. In math it was 79 in the district compared to 77 in the state for those three grades. Though every student can benefit from our program, the academically neediest students and those who are behind when they enroll at the Academy will be well served. The discussion below explains why our program meets the needs of the academically neediest students.

Importance of Language. Problems in language skills have been demonstrated to be a major cause of academic failure in young children. These language difficulties include problems with language processing, retaining information, learning strategies, and vocabulary acquisition. (Effective Teaching Strategies That Accommodate Diverse Learners. Kamen'enui, et. al. 2002). These language problems occur in all social, economic, language, and ethnic groups, and solving them contributes to academic success in all subjects, especially the foundational subjects of reading, writing and math. Meeting these needs requires well-designed and thoroughly researched programs that support the learning and curricular needs of diverse learners, while not holding back the development of higher-performing students.

The Direct Instruction programs apply principles identified in the report noted above. They also contain specific programs that address underlying language weaknesses of low performing students.

Demonstration of meeting needs at national level. The federal study that included the Direct Instruction programs(see Section 5.A) included 9,000 kindergarten to third graders from low-income families in 20 widely varied rural and urban communities, including African Americans, Hispanic Americans, Native Americans, and other ethnic groups. The Direct Instruction programs generally enabled these students to improve at least to average (grade level) by the end of third grade. No other program came close to this achievement.

The effectiveness of DI programs with special needs children is well documented. DI is so widely used with special education students that educators often mistakenly think DI programs were designed and intended only for this population.

Demonstration of meeting needs by Arthur Academies. As noted in Section 2, the Arthur Academies have also achieved a successful track record working with low performing students (meaning students who are behind their peers, or below average). For additional detail, the 38% of the students (245 students), who scored below average in reading, averaged a score at the 20th percentile in the fall. By spring, the average for these same students was at the 55th percentile, an average increase of 35 points. In math the students that scored below average in the fall, gained 38 points on the average. Over 80% of these students gained 15 points or more during the 2007-08 school year.

In five of the six Arthur Academies, 90% of the students in grades 3-5 met or exceeded the state benchmark in reading and math during the 2007-08 school year. Given the information on the low performing students at the beginning of the year, this is a strong indicator of how well our schools serve low performing students.

We have learned that, if at-risk children who have the highest likelihood of learning problems can start kindergarten in a strong academic program, many of their difficulties can be prevented. In 2007-08, 55% of all 138 kindergarteners started the year below average in reading. By the end of the year, there were only 2% below average. In math, 40% were below average in the fall and only 7% were in the spring.

Summary. We expect Oregon Trail Arthur Academy, while serving the full range of student abilities, to become a model for how students who are behind their peers or have various learning difficulties can succeed. Giving this kind of accelerated progress in kindergarten provides children with a huge advantage in future grades. Based on over 50 indications of parent interest to date and based on parent interest and satisfaction in all other AA schools in this kind of teaching model, we think there is sufficient demand for an Oregon Trail Arthur Academy. That's a need and demand we would like the opportunity to meet.

4. Parent and Community Support

A. Parent and Community Involvement. Each Arthur Academy has an active parent organization. Given the interest shown to date, we expect that this will happen at OTAA as well. At least three monthly parent recruiting meetings will be conducted in late spring in addition to newsletters and media to advertise for the school.

Before summer 2009, we will work with an informal parent committee to help locate a facility, assist in parent communications, and help with other school opening preparations (e.g. a summer school picnic). Once school begins, we will create a formal organization of parents and other community supporters, from which an advisory committee will be organized. The parent-community organization and advisory committee will meet regularly; act as channels of communication with the school staff and board; review board policies and actions; and generally help school staff with a variety of activities, events, fund raising, supervision, transportation, maintenance, and cleanup.

B. Governing Board. The governing board of Oregon Trail Arthur Academy will be the board of directors of Mastery Learning Institute (an Oregon nonprofit corporation that governs all Arthur Academies). The board's ultimate responsibility is to make sure the organization achieves its mission and complies with all laws and charter contracts. It has authority to exercise all powers granted to nonprofit corporations and charter schools under Oregon law, which includes the authority to adopt policies; oversee all financial management and academic performance; and appoint, assign responsibilities to, and oversee the Executive Director. The Executive Director is responsible for managing day-to-day operations and all other employees.

The current seven directors include the Executive Director, two community members, and four parents.

5. Educational Program

A. Education Program, Curriculum.

Our instructional model is best found in the Direct Instruction (DI) programs for foundational subjects of reading, language skills and math. These programs have been researched and developed at the University of Oregon and have earned a long record of documented success. In each program, all objectives have been broken into very small increments and activities so that students can be successful in mastering everything that is taught as they progress through the programs. All activities are carefully sequenced and accumulated towards larger learning objectives. Each lesson is divided into small pieces that are presented in exacting and interesting ways so that the children are motivated to learn and so that all children can learn.

Additional aspects of our instructional model are also found in the Core Knowledge programs developed by E.D. Hirsch of the University of Virginia. Core Knowledge programs complement DI programs by teaching more open ended, inquiry material in content subjects through high-interest themes, problem solving, and discovery/research projects. This kind of program provides content where skills are applied increasingly in larger subjects at each grade level. The Core Knowledge programs seek to broaden the knowledge base of all our children. As the Catalogue of School Reform Models says: “Core Knowledge focuses on teaching a common core of concepts, vocabulary, skills, and knowledge that characterize a ‘culturally literate’ and educated individual. Core Knowledge is based on the principle that the grasp of a specific and shared body of knowledge will help students establish strong foundations for higher levels of learning.”

Together, these two bodies of curriculum provide the best of both approaches to teaching, specifically sequenced instruction and more open-ended discovery instruction.

The DI programs provide the skills that can be applied in the more open-ended activities and subjects. In turn, Core Knowledge programs help provide general knowledge that strengthen basic skills and lay the ground work for more advanced skills.

National Studies: Direct Instruction. Four large, highly regarded studies, support the Direct Instruction programs: (1) a huge, seven year (1969 to 1976) federally conducted Follow-Through project that compared at least nine different approaches to teaching (Stebbins, et al., 1977); (2) the Teacher Effectiveness Research (1986, 1990), a body of 33 large field studies conducted by seven independent groups; (3) An independent research review of Direct Instruction programs from 1972 to 1995 by Adams and Engelmann (1996); and (4) the most recent research review of 26 currently used reform programs conducted by the American Institute for Research in 1999 and again in 2005.

Core Knowledge. The Core Knowledge program has been accepted by the National Clearinghouse on Comprehensive School Reform as one of 26 whole-school reform models that have met the criteria for inclusion in the Catalogue of School Reform Models. To be included in the Catalogue, a reform model must demonstrate research-validated results. The most notable are three separate studies (Johns Hopkins, 1998; Taylor, 2000; and Schubnell, 1996), all of which showed Core Knowledge students outperformed control groups on academic achievement tests.

B. and C. Support of and Alignment with State Content Standards. Our program has now been reviewed and approved by five different school districts to ensure that the curriculum complies with state law and properly aligns with state content standards. Major efforts were especially made by the David Douglas curriculum director

and our Executive Director over the past four years, as we have added a grade each year, to review the curriculum for such compliance. Because the DI programs are well sequenced and accompanied with clear and specific program descriptions, alignment with state standards is clear to see. Core Knowledge developed its grade-level sequences from a survey of many state standards, but its content is so vast that we use the Oregon standards as guides in selecting which topics to study.

We have established and will continue to use standing committees for each grade (made up of teachers at our different schools, school managers, and the Executive Director) to look for any alignment gaps or weaknesses relating to state standards, and then to address these weaknesses with changes or supplements to our existing programs. Reports have been prepared for each grade to show alignment between our curricular programs and state standards.

D. Classroom Structure and Instructional Methods. At a glance, classrooms at OTAA will look similar to other classrooms; teachers make sure rooms are orderly and well organized. Differences can be seen in how lessons are conducted. For most lessons, teachers actively present new material (with frequent teacher-student interaction), guide students through the process of mastering material, and assign independent work that students are well prepared to do on their own. This leads to a high level of student motivation and success each day.

Teaching assistants spend a half-day in each class teaching small groups in reading and other subjects. Because of the careful sequencing of learning tasks, the lesson design, the small groups, and the teaching practices used, all students should be

engaged and successful every day. That's our primary goal, but a secondary benefit is that many positive classroom management and behavior effects flow from this.

The methods of classroom instruction used with Core Knowledge materials in content subjects are more varied than the methods used with DI programs in basic subjects. The various methods may include whole class thematic reading and discussion, individual hands-on projects, and small cooperative group assignments and studies. These are more open-ended, and thus allow for a larger degree of individual choice and differential learning according to interest and ability.

However, one reason that DI and Core Knowledge programs complement each other so well is that DI programs teach basic skills that students can apply in the Core Knowledge materials. The principles of "learn to read" (DI) and then "read to learn" (Core Knowledge) are dramatically demonstrated with these two programs. In fact, successful DI instruction in basic skills makes successful study and learning in the Core Knowledge programs possible. As students advance to the next grade level, their application of basic skills to content subjects within both DI programs and Core Knowledge programs increases.

6. Accountability

A. Accountability Plan: School Goals.

District Accountability. Accountability to the district will be based on (1) visits by district administrators to the school and information they ask for; and (2) annual reports. Annual reports will include the audit; financial reports; evidence of insurance; student performance (see Exhibit B below); board policies; and student discipline issues.

Goals—District. School goals concerning the district are: (a) obtain a facility and open the school, fall 2009; (b) have a balanced budget each year; (c) receive a “clean” audit report and make any financial management changes recommended by accountants or auditors; and (d) comply with the charter contract and all laws.

Parent Accountability. Accountability to parents will be based on (1) annual reports to the district; (2) state and national test results; (3) report cards, three times a year; (4) parent conferences, fall and spring; (5) results of parent surveys and other surveys (e.g. ODE surveys); and (6) the advisory committee and parent-community organization.

Goals—Parents. School goals concerning parents (in addition to district and student goals) are: (a) further develop informal parent committee before summer 2009; (b) create formal parent-community organization and advisory committee during 2009-10; (c) attain enrollment goals, 25 per grade, by school opening each fall; (d) by fall 2009 raise funds to meet initial expenses not covered by SSF revenue; (e) hire and train school manager, teachers, and teacher assistants by August each year; and (f) receive a 90% parent satisfaction rating each year.

B. Student Goals. In addition to state testing (grades 3-5), we will test all K-5 students using nationally standardized tests. The group-administered test will be the Stanford Achievement Tests, 10th edition (SAT-10) in reading and math. The individually-administered test will be the Woodcock Reading Mastery Tests. We test all students in the fall and in the spring, so that we can measure gains or losses during the year and from year to year.

- Academic Goal No. 1. On Oregon’s assessments in reading and math, 90% of students who have attended the Academy for three years will meet or exceed state standards, regardless of ELL status, ethnicity, or socio-economic status.
- Academic Goal No. 2. On Oregon’s assessments in reading and math, any classroom of 20 or more will match the percent of district students in each grade that meets or exceeds state standards.
- Academic Goal No. 3. Sixty percent of students starting each year below average (below the 40th percentile) on the SAT-10, in math or reading, will gain at least 15 percentile points each year until they are at least in the average range.
- Non-Academic Goal No. 1. Average daily attendance rate will meet or exceed the rate of district schools for the same grade levels during the prior school year.
- Non-Academic Goal No. 2. Excluding students who move away from the district, at least 80% of students will return the following year.

7. Staffing

A. Staff Composition. A central administrative team provides services to all Arthur Academies (including Oregon Trail), such as teacher oversight and coaching; school management; financial (budgeting, bookkeeping, payroll); human resources; and facilities.

When the Academy opens as a K-2, our five staff members will include the school teacher/manager, who will also teach half-day kindergarten; two other classroom teachers (plus one more each year as we grow); and two teaching assistants. Because our specialized programs require specialize training, finding and training high quality staff is a critical challenge, which we plan to meet in part by transferring three

experienced staff members from our other schools (all of whom have already been identified).

B. Staff Responsibilities. The central administrative team has authority over the OTAA's operations and provides the services listed above. The school manager's responsibilities are to provide overall school and instructional leadership and to oversee the staff, student activities, and interactions with parents and the district.

The classroom teacher's primary responsibility is to ensure that every student has learned the body of knowledge and skills designated by the curriculum. The teacher must teach reading, language arts, and math using Direct Instruction programs; develop and teach lesson plans for Core Knowledge subjects; create an excellent classroom environment and care about the students; and communicate and work cooperatively with parents and other staff.

The teacher assistant's responsibilities are to teach using Direct Instruction programs in small groups; and assist teachers and the school manager with classroom, lunchroom and playground duties.

C. Professional Development. All new and returning teaching staff go through training every August (60 hours for new staff and 30 hours for returning). The central administrative team provides each staff member with an additional 10 hours or more of in-class training during the year. In addition, staff may be sent to seminars and training for Direct Instruction in Eugene and at various Core Knowledge conferences.

8. Budget Narrative

A and B. Overview Use of Grant Funds and Rationale. Below are the seven project goals (summarized in Section 1.B and more detail in the exhibits), followed by the rationale for each activity.

Goal No. 1. Expand interest and involvement of parents and meet enrollment goals. Funds will be used for web site development, advertising, marketing materials, mailings, and costs of parent forums (rent, printing, and miscellaneous) at which we will discuss OTAA and encourage both enrollment of students and parent support.

Rationale. We want to make sure every family in the district hears about the school and has a chance to learn more through the web site, printed materials, and forums, and thereby make a well-informed decision about OTAA. Critical to the school's success will be full or nearly full enrollment each year and strong parent support, including a strong parent-community organization.

Goal No. 2. District approval of the charter application and charter agreement.

Goal No. 3. Recruit, prepare, and continuously train high quality school leaders and teaching staff. Budgeted funds for (a) OTAA summer training (e.g. staff stipends, trainer fees, and materials); (b) sending staff to other training (e.g. DI and Core Knowledge seminars); and (c) recruiting school managers and teachers (e.g. advertising and sending our staff to conferences and job fairs).

Rationale. Our educational programs are central to our mission. They are difficult to teach at the level of excellence we expect and demand to ensure that all students achieve academic success. Therefore, hiring the best staff we can and then providing outstanding training every summer and during the school year are critical, especially training to implement Direct Instruction and Core Knowledge.

Goal No. 4. Purchase school materials and equipment. For school administrative office: furniture, computers, software, other equipment, maintenance and service agreements, and supplies. For classrooms and student activities: furniture, computers, software, other equipment, supplies, and playground structures and equipment. Purchase curriculum materials; classroom supplies; PE, music and art supplies and equipment and instruction services; testing materials and systems.

Rationale. Staff cannot prepare, communicate, or work effectively without “tools.” We will need a full range of curriculum materials, supplies and equipment in order to ensure effective instruction and student achievement.

Goal No. 5. Minor renovations so that facility will comply with all applicable health and safety requirements (initial facility and expansions).

Rationale. Virtually any facility must have some renovation to comply with the special requirements imposed on schools. This includes fire, sprinkler and alarm systems; emergency lighting; wiring; insulation; door hardware; and ADA-compliant rest rooms, doors, walkways, and railings.

9. Business Capacity, Continued Operation

A. Business Office Practices. The Mastery Learning Institute board of directors has adopted a thorough 10-page set of policies that covers all aspects of financial management and was prepared by a CPA who has considerable expertise with the operations of charter schools and the government accounts system.

B. Budget Assumptions. Expense assumptions: All expense estimates were based on experiences with the other six Arthur Academies (a total of seven years of operations). Revenue assumptions: (a) State school funding based on projected

enrollment (ADMw adjusted by the district poverty factor), multiplied by 80% of the charter school rate (using ODE projections for 2009-10, and adding 3% per year); (b) and receipt of the ODE planning and implementation grant.

C. Enrollment Rationale. We will start with K-2 (about 25 students per grade, or 75 total, which would be 62.5 ADMr); and add one grade, or 25 students, per year until we reach K-5, 150 students.

10. Priority

A. Outreach. While charter schools cannot select their students, we have found that Arthur Academies do attract a fair share of students with diverse learning characteristics and students who are significantly behind their peers. In our school promotions (flyers, media, monthly presentations), we make note of the strengths of the schools and show our record of serving children with these characteristics. The reputation of the Academies is well known in serving children with learning problems.

We also market the schools within the Hispanic community with materials and advertisements in Spanish and find ways of getting the word out, such as in local shops and churches. The Direct Instruction programs have decades of documented research showing success with this population across the nation. The Arthur Academies have also begun establishing success with these students, particularly in Woodburn where there is a large population of Hispanic families.

B. Parent Choice. Oregon Trail currently has no elementary charter schools. Thus OTAA would provide the only public small school choice in the district, and certainly the only choice for any family seeking the kind of programs and teaching approach utilized in this charter school.