

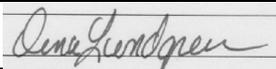
**Ivy Preparatory Academy  
Charter School Proposal**

***Creating the leaders, life-long learners, innovators, and artisans of  
tomorrow by educating the head, heart, and hands today.***

## REQUIRED INFORMATION

Charter School Information						
1. Name of proposed charter school: Ivy Preparatory Academy						
2. Name of applicant: Dena Lundgreen						
3. Authorized agent: Dena Lundgreen						
4. Mailing address: 615 East 5900 South, Murray, UT 84107						
5. Phone number 801.809.5009			6. denalundgreen@me.com			
7. District(s) where proposed charter school is located; Davis						
8. The governing body of a charter school is responsible for the policy decisions of the school. Please indicate the makeup of this body below. (Add lines as necessary)						
Name	Email	Position on Board (e.g., chair, secretary)	Type of Member (e.g., parent, business)	Profession		
Michael Wright	MWright@sahara1.com	Chair	Parent	Real-estate Developer		
Chris Allen	ccallenconsults@hotmail.com	Vice Chair	Business	Businessman/ Vice President		
Jeff Beck	jeffbeck84@gmail.com	Secretary	Business	Real-estate Developer		
Clint Biesinger	clint@verapathglobal.com	Treasurer	Business	Financial Advisor		
Dena Lundgreen	denalundgreen@me.com	Executive Director	Non-voting	Educator		
9. Year school will start: 2017			10. Grades served k-6			
11. Requested Enrollment						
Year 1: Grade K:	80	Grades 1-6:	450	Grades 7-8: x	Grades 9-12: x	Total: <u>530</u>
Year 2: Grade K:	80	Grades 1-6:	450	Grades 7-8: x	Grades 9-12: x	Total: <u>530</u>
Year 3: Grade K:	80	Grades 1-6:	450	Grades 7-8: x	Grades 9-12: x	Total: <u>530</u>
Does proposed grade configuration match resident district grade configuration? <input type="checkbox"/> No <input checked="" type="checkbox"/> Yes						

<p>12. Is this proposal seeking special treatment under UCA <a href="#">53A-1a-501.9</a> <u>No</u></p>	<p>13. Is this proposal seeking priority consideration under UCA <a href="#">53A-1a-502.5</a>? No</p>
<p>14. A charter school may apply to the State Board of Education for a waiver of any rule that inhibits or hinders the school from accomplishing its mission or educational goals set out in its charter. List any waiver requests here (i.e., Rule numbers and titles. Provide details regarding the need for the waiver as Attachment B). n/a</p>	

Signatures	
<p>WE, THE UNDERSIGNED, do hereby certify that, to the best of our knowledge and belief, the data in this proposal are true and correct. Therefore, this proposal for charter school status and funding is hereby submitted with the full approval and support of the governing body of the proposed charter school.</p>	
<p>Name of Authorized Agent: Dena Lundgreen</p>	
<p>Signature of Authorized Agent</p>	
<p>Name of Charter School Board Chair : Michael Wright</p>	
<p>Signature of Charter School Board Chair</p>	

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## **EXECUTIVE SUMMARY**

Ivy Preparatory Academy (IPA) provides a proven, developmentally driven, holistic schooling option to a community seeking a child-centric approach in which students experience a rigorous and relevant education in all core subjects, but who also value a purposeful multisensory education integrating singing, playing a musical instrument, drawing, painting, modeling clay, working with wood, acting in plays, and doing handwork such as knitting and sewing. Through the use of the 100-year-old Waldorf methods and a comprehensive understanding of human development, the school will instill not only high standards for academic achievement, but also intellectual curiosity, creative thinking and problem solving, social responsibility, and self-expression, as well as, valuable interpersonal and practical life skills. Cooperation, collaboration, and self-advancement are encouraged, rather than outwardly directed competition, with the goal of enabling students to freely choose their individual paths in life.

### **APPLICANT GROUP'S ORIGIN**

The founders of IPA represent a diverse group of experienced individuals who are committed to providing an excellent educational experience to students in the Bountiful area. Together, these individuals will keep IPA fiscally sound, legally compliant, and educationally aligned. They offer years of experience in teaching, board governance, entrepreneurship, management, business finance, real estate, construction, accounting, budgeting, law, strategic planning, and human resources.

### **IPA DEVELOPMENT**

Slated to open in August of 2017, IPA will be located in the Bountiful area of Davis County. It will serve up to 530 students which will include four Kindergarten classes of up to 20 students each, three classes per grade 1-6 with approximately 25 students each, for a total of 530 students. IPA will serve students of all incomes, cultural backgrounds, and academic abilities. The Bountiful location will draw students from the local community and the surrounding region.

### **EDUCATIONAL PROGRAM**

IPA is a K–6 public school that:

- Uses effective brain-based pedagogical practice to deliver a rigorous, relevant and balanced liberal arts education, structured around the Utah Core Standards.
- Uses a “head, heart, and hands” philosophy resulting in multi-sensory engagement and sustainable learning.
- Immerses children in the arts and an environment that nurtures their emerging capacities at each developmental stage.
- Nurtures the intellect, imagination, and emotional life of each child.
- Incorporates sustainable living practices, environmental stewardship, and experiential learning through time spent out of doors.

- Inspires children to live free, engaged and successful lives, prepared to meet the demands of their world.

### **SCHOOL COMMUNITY**

IPA has a collaborative model of governance with the Governing Board, made up of community members that oversee the budget, operations, and mission of the school. Teachers are involved in the process of leading IPA through Leadership Council and can participate in a variety of committees. Teachers follow the same students through the grades (looping), which nurtures a community of trust and stability

IPA also involves parents in the school community through the Parent Guild. Members help plan school activities, parent/community involvement, and fundraising. IPA provides a variety of opportunities designed to involve families.

## **Section 1**

### **SCHOOL PURPOSE AND GOALS**

#### **PURPOSE**

As specified in Section 1, A and in harmony with the intention of the State Charter School Board in UCA 53A-1a-501.9, IPA's purpose is to improve student learning by employing new and creative methods of education that will create an innovative, developmentally-appropriate educational choice for students and parents within the public sphere and meet the unique learning styles and needs of many students that may not be thriving in the traditional-model schools available in the community.

As the second Waldorf-inspired school in the State of Utah and the first in Davis County, IPA provides a successful, time-tested approach to education creating substantially increased choice in educational models in the Bountiful area where only a couple of realistic options for charter schools exist. One of these schools implements a direct instruction method while the other focuses on students within the spectrum of autism. While both schools serve a great need, and perform well, there are no options for students seeking a more experiential, arts integrated, holistic approach to learning.

#### **Improved Student Learning**

IPA fulfills the purpose of improving student learning through its proven, arts integrated, interdisciplinary and developmentally differentiated "Main Lessons" which present core subjects in 3 to 4 week units. Studies have shown significant correlations between academic success, enhanced critical thinking abilities, and positive attitudes towards community in students who are educated with arts-integrated curricula.

#### **Greater Educator Participation in Innovative Teaching Methods**

IPA teachers do not adhere to a scripted curriculum. They are expected to be engaged authorities in their subject matter. Their knowledge of the diversity of learning styles and needs among students, paired with their awareness of child development, invariably leads to the use of a variety of new and differentiated teaching methods and assessment. Innovation comes through finding purposeful ways to incorporate art, movement, and song into core lessons fully engaging the body in the learning process. IPA is innovative in its assessment by using broader whole-child formative assessment of skills such as artistic ability, social and emotional capacities, musical competency, and fine/gross motor development.

#### **MISSION**

Ivy Preparatory Academy provides a rigorous, relevant, and memorable k-6 Waldorf- inspired education that integrates academics, the arts, movement, nature, and social responsibility. In taking the time to educate the head, heart, and hands, and by teaching capacities in thinking, feeling, and willing, we maintain the integrity of childhood while preparing students for the future and

awakening within them, warmth of heart, freedom of thought, and strength of purpose.

## **VISION**

In 5-10 years, IPA will:

1. Be recognized by the wider community and prospective families as an excellent and desirable public school choice.
2. Employ a dedicated staff trained in Waldorf methods that create and implement developmentally driven, arts integrated, engaging main lessons.
3. Be supported by strong parent involvement.
4. Enjoy a school community commitment to the values of Waldorf education, collaboration, and respect in their dealings with each other and in their work.
5. Meet high academic goals by providing a Waldorf-inspired standards-based education that includes reading, language arts, mathematics, science, social studies and character education as well as a full array of specialty programs such as vocal and instrumental music, eurythmy, woodworking, handwork, physical education, foreign language, visual and performing arts, gardening, and sustainability education.
6. IPA graduates will be imaginative, creative, free thinkers who are academically, socially, and emotionally successful as measured by their ability to transition into the next phase of their education confident and engaged.

## **EDUCATIONAL FOUNDATION AND CULTURE**

Waldorf education is the fastest growing independent school movement in the world. The modern philosophy behind “Waldorf” education is based on an innovative school started in Stuttgart, Germany in 1919 by the Austrian philosopher, scientist, and thinker Rudolf Steiner. In responding to a request to start a school during the cultural upheaval in Germany following World War I, Steiner outlined a model for education that has since inspired many schools called “Waldorf” after the first Steiner school. At its very inception, the first Waldorf school embraced a sense of equity and social responsibility, educating boys and girls together, being open to all children, stretching across a wide range of grades, and involving teachers in school governance. Underlying all instruction is a three-fold model of human development, which acknowledges how, in different stages, children grow in their capacities to will (meaning move and do), to feel, and to think. IPA’s approach to education practice is built on this rich Waldorf philosophy and commitment to education for social renewal.

***Education for All:*** Regardless of a child’s background, race, language, gender, or ability, the intent of Waldorf education as outlined by the founder, Rudolf Steiner, was to support children and youth to develop their individual abilities and become aware of and constructively active in the world toward greater benefit of all humanity (Oberman, 2010). IPA believes that all children deserve an excellent

education that gives them the time, space, and tools to develop into their highest self.

***Education for the Whole Child:*** IPA's Waldorf methodology emphasizes developing equally the students' intellectual, physical and social skills while building upon their inherently imaginative and creative nature. Waldorf teachers present core academic subjects in a manner that develops a child's capacities to:

- "think" or analyze and form judgments and conclusions (the "Head").
- "feel" or imagine and engage material with a personal connection (the "Heart")
- "will" or move, do and create (the "Hands");

***Engaged Teaching:*** IPA views teaching as a "lively art." The success of Waldorf methods lies in the hearts of engaged, highly trained teachers who translate the philosophy into practice. IPA teachers are artists, creators, mentors, and examples of human beings that are worthy of emulation. They are committed to a shared vision and collaborative in practice. They are self-reflective and continue to grow as they follow their students throughout the grades.

## **ANTICIPATED STUDENT POPULATION**

See Executive Summary: IPA DEVELOPMENT

## **MEETING THE NEEDS OF STUDENTS**

The target population of IPA is not defined by a particular demographic or socio-economic characteristic. IPA welcomes diversity and will meet the needs of varied parents and students by providing a proven, multi-sensory, rigorous, child-centric education that works in harmony with brain development for optimal growth and learning at all ability levels. Students who may be struggling socially, emotionally or academically in a traditional classroom, or those who would benefit from a more holistic educational experience, will be well served by IPA.

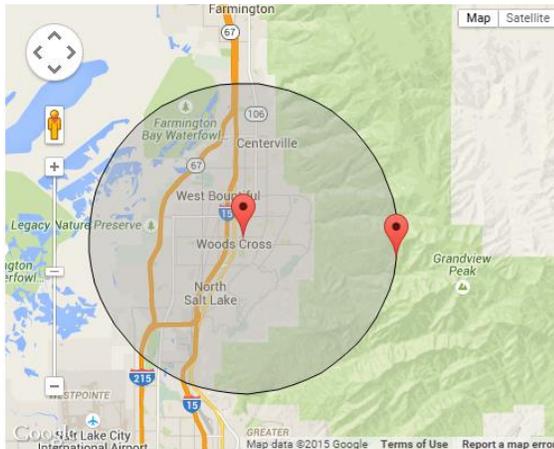
## **Section 2**

### **MARKET ANALYSIS**

IPA will be located in, or around, Bountiful Utah. It is the school's goal to reside on the east side of I-15. While this has traditionally been a high priced area for land, we have located a number of sites that will fulfill the purposes of the school. A more detailed list of properties will be listed in the application, but were not asked for in the proposal.

IPA will be the **FIRST AND ONLY** project based school within the school's target location. Currently there are only three charter schools located within the 5-mile radius. Two of those schools focus on direct instruction, and the third school specializes in students with Asperger's, and Autism. IPA will attract parents that are looking for a more holistic, and project based style of learning. Another need that IPA will fulfill, is that although 5 miles on a map isn't too far away in theory, it is problematic going from east to west in Bountiful, and its surrounding areas. Many of the families we surveyed pulled their children from local charter schools, because it took them 30 minutes each way to get the kids to, and from school. A school on the east side of I-15 would drastically cut down on this time, and allow many parents looking for a charter school the option to attend.

For the purposes of the proposal, we have studied the 5-mile radius surrounding our first option for the school, located at approximately 1700 S Main Street, in Bountiful. This location is in the heart of Bountiful, and is surrounded by residential housing from 360 degrees.



There are currently 16 traditional public schools, 3 charter schools, and 1 private school within a 5-mile radius of IPA's target location. Below, are listed the schools within this range, along with their student count, and 2013-14 school grades:

- Adelaide – 583, C
- Boulton – 480, B
- Centerville – 485, B
- Foxboro – 1071, C
- Holbrook – 450, B
- Legacy (CS)\* – 775 (K-6), B
- Meadowbrook – 391, C
- Muir – 656, B

- Oak Hills – 424, A
- Orchard – 718, B
- Spectrum (CS)\*–248 (K-6), C
- St Olaf (Private) – 138, N/A
- Stewart – 725, B
- Taylor – 374, A
- Tolman – 391, B
- Valley View – 468, A
- Wasatch Peak\* (CS) – 416, A
- Washington – 272, C
- West Bountiful – 636, B
- Woods Cross – 751. C

Please note that there are currently 4 “A” schools, 9 “B” schools, and 6 “C” schools. Although these grades are better than other areas around the Wasatch Front, there is definitely room for improvement. IPA will offer a new, and innovative way of teaching students. We are confident that this innovation will result in higher grades, in an area that can definitely use an alternative to what is being offered. Waldorf schools around the nation have consistently outperformed their peers.

Over the past year, IPA has been polling families in Bountiful. We have spent time at community events, and going door to door to ensure that IPA would be supported. As to not sway families one way or another, we limited our survey to two questions:

1. Would you support a charter school in East Bountiful (meaning east of I-15)?
2. Would you prefer a charter school that focuses on direct instruction, or a more project based type of learning?

We surveyed a total of 483 families. 449 families said they would support a charter school, 34 families said they would not. Of the 449 families that would support a charter school, 73% said that they would prefer a project based charter school over direct instruction. Those 327 families represent over 600 students, grades K-6. IPA was created to support a community that is asking for an alternative to what is currently being offered.

### Section 3 PROGRAM OF INSTRUCTION

#### **Curriculum**

IPA uses the Waldorf curriculum and is aligned with Utah Core Standards. It is guided by the principle that children learn best when they are engaged in learning in a three-fold way: intellectually (head), emotionally (heart) and actively (hands).

#### **REPLICATION OF WALDORF DESIGN**

IPA's educational focus is based on practice and principles of Waldorf Education which is at once a philosophy and methodology. By using an established, researched, proven methodology and curriculum practiced in over 1000 schools worldwide, IPA can ensure that its practices will lead to strong educational outcomes for all. There is a well-established and growing body of research substantiating Waldorf curriculum practices. Research also supports utilizing multiple modalities and intentional play to help students access the curriculum and process key information. The use of multiple modalities to facilitate learning is central to Waldorf education. A growing body of research in cognitive science confirms that learning information through movement, drama, singing, and non-linguistic representations such as pictographs or drawing reinforces the student's ability to retain and understand information and improve skills (Marzano, 2004; Gardner, 2006).

To ensure an efficient, successful replication of the Waldorf method, IPA will:

1. Recruit Waldorf trained teachers.
2. Provide Waldorf certification opportunities for staff.
3. Provide continual professional development from both site-based and outside resources.
4. Collaboration with the Alliance for Public Waldorf Education (APWE) and partnerships with successful public Waldorf schools throughout the country.
5. Assemble a robust teacher library of resources and curriculum guides.
6. Regularly evaluate and support teachers in their personal professional development plan.

IPA will show fidelity to the Waldorf methodology through implementing the following hallmark components:

a) **A Living Curriculum:** IPA will empower, train and support its teachers in making the curriculum "a living one" (Richter & Rawson, 2004). Teachers will actively shape the curriculum in order to deliver it in the most meaningful, relevant, and dynamic way to students.

- b) **Arts-immersion:** Students will be exposed to and/or engaged in the arts in all core subject areas.
- c) **Artistic and Enlivened Teaching:** See Section 1 *Engaged Teaching*
- d) **Culturally Rich and Relevant:** “Waldorf has been distinguished as the only education reform initiative officially endorsed by the United Nations Educational, Scientific and Cultural Organization (UNESCO) for its commitment to cultural and cross cultural bond building (Oberman, 2010). Waldorf curriculum offers an array of opportunities for students to study cultures outside of their own preparing them for the global society in which they live.
- e) **Developmentally Appropriate:** The latest research in educational neuroscience establishes strong linkages between high student achievement and Waldorf-inspired methods. Marzano’s research confirms that the use of certain practices used in Waldorf schools, like teacher looping, summarization, and interdisciplinary teaching allow children to excel on a variety of assessments, including standardized tests (Oberman, 2008). IPA will provide a developmentally driven education in alignment with prevailing theories of cognitive development such as those of Erik Erikson and Jean Piaget. IPA knows that the brain grows in spurts, releasing new capacities in the maturing child and adolescent. In Kindergarten, the child’s active nature requires an instructional focus on concrete, experiential lessons, rather than abstract concepts. Beginning in first grade, IPA’s curriculum reorients itself toward children’s growing emotional capacity, using art, music, and movement as an effective means of exploring and acquiring core academic knowledge in reading, writing, mathematics, sciences and history. With this early and middle grade preparation, Waldorf students matriculate to the later grades with a uniquely broad foundation for a more intellectually oriented curriculum, primed for self-reflection, and truly creative,
- f) **Sequential Cycling (whole to part to whole):** A robust body of research has signaled the trade-off made in many curricula in our high accountability context between teaching basic skills and knowledge and teaching higher order thinking skills (Darling Hammond, 2008). At IPA, “lessons will move from the whole, or the big picture, through a story or image, to the part, or the specific skills to be acquired or practiced, and then back to the whole through artistic activity designing graphic organizers or essays to reflect on the whole. This movement from whole to part and back to whole means a lesson begins with synthesis and analysis and then moves to practicing recall and repetition, to come back to synthesis and analysis in the integration” (Oberman, 2010).
- g) **Relationships:** “A high quality education starts with relationships” (Baratz-Snowden & Darling-Hammond, 2005). Students will be nurtured and known by a team of teachers (main class and specialty teachers) who collaborate to determine progress and needed support in all areas of development.
- h) **Rhythms of the day and year:** Waldorf teachers work consciously with the idea of “rhythm.” This approach sees consistency as a vital element of learning. During the school day the rhythm of learning ebbs and flows with a balance of experience between concentration and relaxation, mental and practical work, movement and stillness, listening and participation, observing and doing. Such rhythm sparks interest, maintains attention, and supports children physiologically.

i.) **Eurythmy and Movement Education:** Holistic education recognizes the importance of movement in cognitive development. Eurythmy, the art of using the body to represent and interpret speech, will be used in the younger grades. Older grades will use movement to teach concepts and strengthen the mind and body.

j.) **Handwork:** Students will learn to knit, sew, and do woodwork as part of a brain-based, holistic practical education. █

**Supplementary Curriculum:** Not only will IPA adapt existing Waldorf curriculum to ensure alignment to Utah Core Standards, but will also provide any needed curricular resources and programs in the core subjects.

## **RESEARCH BASED PROVEN EDUCATIONAL OUTCOMES**

Dr. Mary B., 2009's *Transformational Teaching: Waldorf-inspired Methods in the Public School* specifically addresses Waldorf education in the public setting. Goral looks at public school teachers who implemented Waldorf-inspired teaching into their urban classrooms in Louisville, Kentucky. This qualitative study found that students in these classrooms were more engaged in the learning process and were happier in school. Teachers reported that methods inspired by Waldorf education helped them build strong classroom communities and kept the teachers' passion for teaching alive (Goral, 2009).

In "Learning from Rudolf Steiner: The Relevance of Waldorf Education for Urban Public School Reform," a study published in 2008, researcher Ida Oberman concluded that the Waldorf approach successfully laid the groundwork for future academics by first engaging students through integrated arts lessons and strong relationships instead of preparing them for standardized tests. In her assessment of four California public schools that use Waldorf methods, Oberman conducted a study comparing standardized test scores between Waldorf Charter Schools and schools of similar demographics in California. This study showed that 2nd Grade Waldorf students perform slightly below their peers, while 4th Grade students are about equal in performance. By 8th Grade, the Waldorf students matched the top 10% of their peers and far surpassed the average scores on the California Statewide Tests (Oberman, 2010).

In a more recent 2011 study, public Waldorf schools were compared to traditional public schools using their district standardized test scores in reading and math. Test score results suggested the Waldorf experience provided a slower academic build-up resulting in lower test scores in the early grades followed by higher levels of advanced performance by the 8th grade (Larrison, Daly, & VanVooren, 2012).

### **Specific of Waldorf Charter Success**

The Waldorf method has been replicated over the past 20 years in over 60 public charter schools in states from Alaska to Florida.

One example of the success of this replicable design is Stone Bridge Charter School (SBCS) in Napa, California serving grades k-8. Originally known as Napa Valley

Charter School, SBCSs charter was granted by the State of California with Twin Ridges Elementary School District acting as sponsor in 1998. In 2004, in response to a change in state law requiring charter schools to be authorized by their local district, the school embarked on a process to update the charter and to apply to the Napa Valley Unified School District for local authorization. During this process the school changed its name to Stone Bridge School. Since then, SBCC's charter has been renewed twice, once in 2010 and again in 2015.

The school enjoys a student retention rate of > 96% and an attendance rate of > 96%. SBCC has consistently attracted highly qualified teachers and has a stable administration, solid Governing Board, and supportive community. The school has grown both academically and in population. This shows in their academic standing. While the school-wide (grades 2-8) Academic Performance Index score (based on California STAR tests) was just above the state target at 801 for the last testing year of 2013, their middle school score (grades 6-8) was 883. This is based on the pacing and age appropriate/more gradual introduction of academics in the Waldorf curriculum as compared to current mainstream public schools. SBCC's middle school scores continue to rise while the mainstream public middle school scores typically flatten or decline.

This following data is based on STAR and demonstrates how well students are doing in relation to the state content standards. On each of these assessments, student scores are reported as performance levels for the entire school with the percent describing the rate of students scoring at Proficient or Advanced (meeting or exceeding the state standards).

Subject	Stone Bridge			District			State		
	2010-2011	2011-2012	2012-2013	2010-2011	2011-2012	2012-2013	2010-2011	2011-2012	2012-2013
ELA	61%	73%	60%	53%	56%	52%	54%	56%	55%
Math	66%	67%	51%	48%	49%	46%	49%	50%	40%

Another example is the Journey School located in Aliso Viejo, CA. Journey opened in 2000 with 90 students in grades K–3 growing the total school to 240 students grades K–8 by 2007. They have had their charter renewed by Capistrano Unified School District twice; 2005 and 2010. These renewals and current student achievement data demonstrate Journey's consistent trend in performing above the state average. As above, the following data is based on California's "STAR Program."

Subject	Journey			District			State		
	2010-2011	2011-2012	2012-2013	2010-2011	2011-2012	2012-2013	2010-2011	2011-2012	2012-2013
ELA	64%	74%	74%	73%	75%	74%	54%	56%	55%
Math	65%	65%	74%	66%	67%	65%	49%	50%	50%

### DIRECT OBSERVATION OF WALDORF METHODS

IPA's board Vice President, Chris Allen, began observing Waldorf education in the early 1990's. He is a founder of The Arizona Council for Waldorf Education, an organization that has assisted with the founding of eight schools in Arizona, six of which are public charter schools. One of these is 21- year-old Desert Marigold School (DMS) a K-12 charter school in Phoenix, AZ. The following describes his direct observations at DMS as well as other Waldorf-inspired charter schools in Arizona:

1. Waldorf is truly a holistic model of education. Students learn foreign languages, play several musical instruments, participate in the fine arts, knit, construct a modest building, and have gardening experience, in addition to a rigorous education providing them with an ability to advance as far as they can go. A recent MIT President was Waldorf educated and one of many examples of successful Waldorf students.
2. Parents love the Waldorf way. My own children had a traditional education supplemented with Waldorf-inspired parental teaching and have done extraordinarily well. My oldest son is a Harvard graduate who has won multiple awards and scholarships and the Director of Education in Southern California. My other children are educators with advanced degrees and honors. I owe their dedication to learning and well roundedness to Waldorf methodology.
3. Waldorf educated children are "pro-active" in their approach to all facets of life. The majority have a true "can-do" attitude and a love and thirst for education that permeates the school site.
4. Waldorf classrooms are engaging and dynamic; full of activity where children are learning by doing or are fascinated by a story they are listening to, and experiencing in a variety of ways.
5. My wife is a Waldorf teacher. They are truly engaged and teach out of love for and belief in a system that has worked and continues to work.

**Section 4**  
**PERFORMANCE MEASURES**



**Indicator- upholding mission and purpose**

<b>Measure</b>	<b>Metric</b>	<b>Board Goal</b>
<p><b>IPA will provide a developmentally appropriate education:</b> Teachers will use Waldorf methods combined with their awareness of current educational/brain research in their pedagogical practice as they deliver the Utah Core Standards.</p>	<p>Administrative observation and assessment of developmentally appropriate, brain-based pedagogical practice in each classroom</p> <p>Teacher evaluation tool</p> <p>Teacher lesson plans</p> <p>Administration/teacher interviews</p>	100%
<p><b>IPA will provide a holistic education including:</b> Visual Arts Music Drama Handwork Movement Nature based learning Experiential based Learning Recitation Storytelling</p>	<p>Administrative observation and assessment of curriculum implementation by teacher in respective classrooms</p> <p>Students will show implementation by: Projects Exhibitions Performances Concerts</p>	100%
<p><b>IPA will offer a rigorous language arts curriculum:</b> Students are literate and articulate. They can clearly demonstrate reading, writing, listening and speaking skills. Students can communicate clearly to others, both orally and in writing. Students can comprehend and interpret a variety of forms of written expression.</p>	<p>State mandated test Teacher assessment Curriculum-based assessments Portfolio Exhibits Bonnie River Rubrics Main lesson books</p>	80%

<p><b>IPA will offer a rigorous math curriculum:</b> Students can reason logically and understand and apply mathematical processes, concepts, and techniques. The four basic processes, fractions, decimals, geometry, percent, interest, algebra, area, and solid geometry.</p>	<p>State mandated test Teacher assessment Curriculum-based assessments Portfolio Exhibits Bonnie River Rubrics Main lesson books</p>	<p>80%</p>
<p><b>IPA will integrate sustainability into the curriculum:</b> Students will learn lessons about sustainable human communities and natural ecosystems. They will understand the circle of life and the seasons, know how to plant and care for a garden, compost, and recycle.</p>	<p>Teacher assessment Projects Portfolios</p>	<p>100%</p>

## APPROACH TO ASSESSMENT

IPA will use a variety of assessment instruments and methods to inform and drive instruction as well as provide insight into the development of the whole child. When deciding upon the types of assessment to use, the school and teachers will consider WHY they are assessing, WHAT they are assessing, and WHAT are the criteria for success. Assessment will be used to evaluate program efficacy and implementation and teacher effectiveness. It will be the catalyst for school improvement plans and fulfillment of the Charter School Performance Standards and site goals, as well as, goals in the charter agreement.

**Evaluation of Students:** IPA will evaluate the progress of students by ongoing formative and summative assessments, administered at appropriate intervals. Teachers will utilize progress-monitoring tools to track student learning, assess and improve both remediation and extension practices, to refine tiered instruction, and strengthen Response to Intervention. IPA will collaborate with APWE and/or a Waldorf consultant to create formative assessments unique to IPA’s mission and vision. Student progress will be reported to parents through formal and informal parent teacher conferences and progress reports.

Student assessments include, but are not limited to:

**Waldorf Specific Assessments:** Gradalis Educational Consulting Services, etc.

**Authentic assessments:** Portfolios, main lesson books, demonstrations, etc.

**Classroom Assessments:** Teachers will develop standards-based assessments to inform instruction.

**Curriculum-based Assessments:** Will drive Tier 1 instruction, remediation, reteach, and challenge activities.

**State-mandated Assessments:** Resulting data will be used to drive instruction as well as influence school improvement plans.

**Special Populations:** assessments will be used on a case-by-case basis.

IPA will engage in an annual Strategic Planning Process to assess overall school performance. This process will include both internal and external evaluations.

**Internal Evaluation:** Analysis of student outcomes, staff evaluations, parent involvement, parent satisfaction surveys, student satisfaction surveys.

**External School Evaluation:** Evaluation by an independent knowledgeable evaluator from outside the school community. Evaluation includes an assessment of the instructional program as well as other qualitative and quantitative information concerning school operations, culture and teaching. This ensures IPA is adhering to its mission and meeting its intended goals as a Waldorf - inspired public school.

## **Section 5** **GOVERNANCE**

IPA understands the importance of creating a board that will not only have the responsibility of governing a successful charter school, but also have an understanding of how to govern a successful small business. IPA will be founded by a group of local educators, business owners, and parents. To date, there are four governing board members. We are also currently recruiting at least one additional board member. This position will be filled before our entire application is turned in.

IPA has also engaged a Director. As a board, we feel passionate about finding a Director early in the process, so that the vision of the school can be fully understood. We also feel that having the Director in place at this point, offers us a unique perspective through the eyes of an educator. Dena Lundgreen has a wealth of knowledge, both as a teacher, and administrator. Currently, the board members are:

- Michael Wright, Governing Board President:
- Chris Allen, Governing Board Vice-President:
- Clint Biesinger, Governing Board Treasurer:
- Jeff Beck, Governing Board Secretary:
- Dena Lundgreen, Executive Director (non board-member):

A detailed bio, and qualifications are outlined in Appendix A.

As with all charter schools, IPA will ensure that its board understands the role, both as a Founding Board, and a Governing Board. Again, an advantage to hiring a Director this early in the process will allow IPA's board to focus on board responsibilities, and create effective habits of governance. As outlined in Appendix A, all members of the board have had both non-profit board governance roles, as well as charter school specific oversight in some capacity.

IPA is aware of, understands, and follows all of Utah's Open & Public Meetings Act.

## Appendix A: Governing Board Background

Provide the following information on each startup board member and any individuals responsible for the day-to-day operation of the school who have already been identified. Complete this form, do not include a resume. This page may be copied as many times as necessary.\*

Name - Michael Wright

Role with School - Founding Board Member and Chair of the Board

Expertise - Real Estate Developer and Business Owner

### Statement of Intent:

I look forward to making the Ivy Preparatory Academy a reality for the students in the South Davis County area. I see my role as Chairman of the Board to make sure the school remains legally compliant and continues fiscally sound. Having developed real estate and owned different businesses, I will look to provide guidance on public relations, hiring of staff, and review financial documents. I want to provide the best education possible for not only my children, but for those in the community that want best practices in education as a part of their children's experience. I am committed to Ivy Preparatory Academy and its Waldorf inspired program. It is needed in my community.

### Not-for-Profit History:

I served on the SaharaCares board for several years. SaharaCares is a non-profit foundation whose goal is to provide opportunities for disadvantaged children that they might not otherwise have. One of the major focuses of SaharaCares is children with Autism. Each year SaharaCares has the Autism Carnival. During my tenure on the board, the Autism Carnival grew from 1,500 to over 3,000 participants.

### Employment History:

After completing my Business Management degree from the University of Utah, I went to work for Sahara, Inc. Sahara is a mid size construction company. My role was project management over large commercial construction projects. During my 9 years at Sahara, I started two divisions. Sahara Interiors was established to broker furniture and equipment to our construction clients and the other division was Sahara Development which provided development and pre-construction services to our clients. In 2005, I started Giza Development. Giza develops all types of projects from student housing, office warehouse, and office to senior care and charter schools. Giza continues to develop commercial projects today.

### Education History:

BS in Business Management, August 1997, University of Utah  
Snow College, December 1992

WITH THE SIGNATURE BELOW, PERMISSION IS HEREBY GRANTED TO VERIFY ANY INFORMATION PROVIDED ABOVE

FOR IVY PREPARATORY ACADEMY

I AFFIRM THAT THE INFORMATION PRESENTED HEREIN IS TRUE AND CORRECT TO THE BEST OF MY KNOWLEDGE.

A handwritten signature in black ink, consisting of a large, sweeping initial letter followed by several smaller, connected letters. The signature is written above a horizontal line.

Applicant's Signature

## BACKGROUND INFORMATION SHEET

Provide the following information on each startup board member and any individuals responsible for the day-to-day operation of the school who have already been identified. Complete this form, do not include a resume. This page may be copied as many times as necessary.\*

Name Christon C. Allen

Role with School V.P. of School Board/Board Member

Expertise Establishing Waldorf based schools

### Statement of Intent:

I will serve as Board Vice President for Ivy Preparatory Academy. I have been involved with Waldorf education for close to 25 years. This involvement began with the founding of Arizona Council for Waldorf Education which is an organization that fosters the development of Waldorf inspired schools in Arizona. We currently have seven operating schools in Arizona. One of these, Desert Marigold School is a K-12 charter school which will celebrate its twenty-first birthday this coming year. I have served as a board member for DMS which is located in the Phoenix, Arizona area where I maintain a residence. Both my wife and daughter are experienced Waldorf teachers whom I have encouraged for a number of years.

I have maintained a business office in the Bountiful, Utah area in the past and for the last several years have been involved in meetings and presentations involving Waldorf education, primarily in Utah County where I have presented "Why Waldorf Works" as a well attended lecture. I have also assisted with education conferences where I have made introductions for Waldorf/charter school professionals from other geographical areas.

It has been a dream of mine for many years to see Waldorf education, particularly the charter school version, made available to our children. I believe very strongly in the curriculum and principles represented by Waldorf. I believe the Ivy Prep. group to have the abilities and motivation and resources to make Waldorf work in Bountiful, Utah.

### Not-for-Profit History:

I have made a special study of non-profit funding programs for K-12 schools. I have consulted Arizona based Waldorf charter schools on an individual school basis and for many years as a founder and member of ACWE (Arizona Council for Waldorf Education), which has assisted with the development of currently, seven schools. ACWE has been in existence for almost 25 years and we have two schools which were established 20 years ago. One of these, on which I have served as a school board member, is a K-12 Waldorf inspired charter school. I have also spent many years working with my religious organization and also the Boy Scouts of America in a variety of positions.

**Employment History:**

I am currently employed as Vice President of Gains Corporation, which is the managing member of Gains Venture Group, LLC. We have funded a number of companies seeking to become publicly traded. The principals of this group have been involved together for many years in non-profit activities, specifically for members of the Hilton (hotel) family, one of which is my associate in Gains. Two of the other Gains associates were Phoenix,

“Philanthropist” of the year. I have owned and operated a consulting firm, C.C. Allen and Associates, an Arizona proprietorship, for 25 years. We have helped scores of companies in becoming publicly traded and also in developing capitalization programs. I have a cum laude Bachelor of Science Business degree from Arizona State University, and also wrote a syndicated column “Franchise Facts” which appeared in small newspapers for a number of years.

**Education History:**

I attended schools; elementary through College in Arizona. I began my college training in 1969 at Mesa Community College where I completed two years before entering the U.S. Navy in early 1972. During my years in the service, I had special training in Oceanography and associated subjects and was able to work on the implementation of the Magnetic Anomaly Detection System initially developed by Gulf Oil. This was part of my work as an anti-submarine warfare operator. I was a helicopter crewman (duties including search and rescue) and was in charge of Aircrew Training for enlisted service men until my honorable discharge in 1975.

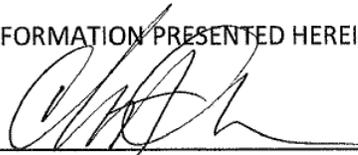
I re-entered college in 1976 subsequently attending Arizona State University where I received a Bachelor of Science in Business Administration (cum laude and on the Dean’s list six times). I spent two years in graduate school in English literature, also at A.S.U.

I was a professional lecturer for Discovery Resources, a New York based seminar company for three years, during which my 90 minute seminar was presented in New York, other U.S. cities, and also in Cancun, and Puerto Vallarta, Mexico.

I also served as a L.D.S. Institute teacher in Gilbert, Arizona.

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I AFFIRM THAT THE INFORMATION PRESENTED HEREIN IS TRUE AND CORRECT TO THE BEST OF MY KNOWLEDGE.



Applicant’s Signature

# BACKGROUND INFORMATION SHEET

Provide the following information on each startup board member and any individuals responsible for the day-to-day operation of the school who have already been identified. Complete this form, do not include a resume. This page may be copied as many times as necessary.\*

Name Jeffrey David Beck

Role with School Secretary

Expertise Business Management and Real Estate Investment

**Statement of Intent:**

I will be serving as secretary for the Ivy Prep Academy charter school board. As secretary I will be responsible for ensuring the board is organized and meeting on a regular basis. I will take minutes in our meetings and ensure attention to detail.

As a native of Bountiful and a product of its education system, I believe strongly in this charter school and its curriculum. I believe the Ivy Preparatory Academy will provide an excellent option when residents decide where to send their children to excel.

**Not-for-Profit History:**

- Redpine Canyon HOA Board (Current): Position – Secretary/treasurer.
  - I am part of the HOA board for 60 townhomes near the Canyons Ski Resort in Park City, Utah.
- Brasil Doce Lar Foundation (2008-2012): Position – Managing Member
  - I served as the managing member for an organization that assisted underprivileged children in Brazil receive a private education. I was responsible in helping identify candidates and assisting them financially to obtain a fantastic education.

**Employment History:**

- Digg Partners (2012-2015): Position – Managing Partner
  - I am the Managing Partner of a Real Estate Investment partnership. We focus on commercial properties and development opportunities in Utah market.
- Redfish Investments (2010-2015): Position – Owner
  - I am an owner in a boutique real estate development and construction company.  
We focus on in-fill development in the Salt Lake Market.

**Education History:**

- University of Utah (2008): BA International Studies/Minor in Business Admin
- University of Utah (2012): MBA David Eccles School of Business
- Project Management Institute (PMI): PMP Certified (Project Management Professional)

WITH THE SIGNATURE BELOW, PERMISSION IS HEREBY GRANTED TO VERIFY ANY INFORMATION PROVIDED ABOVE FOR Ivy Preparatory Academy CHARTER SCHOOL.

I AFFIRM THAT THE INFORMATION PRESENTED HEREIN IS TRUE AND CORRECT TO THE BEST OF MY KNOWLEDGE.



A handwritten signature in black ink, appearing to read 'J. R. [unclear]', is written over a horizontal line. The signature is stylized and somewhat illegible.

**Applicant's Signature**

## **BACKGROUND INFORMATION SHEET**

Provide the following information on each startup board member and any individuals responsible for the day-to-day operation of the school who have already been identified. Complete this form, do not include a resume. This page may be copied as many times as necessary.

Name Clint Biesinger

Role with school Board Treasurer

Expertise Charter School Finance and Business

### **Statement of Intent:**

My role on the board will be as a board member and I'm currently designated as the board treasurer. I worked closely with Treasurer Ellis and a financial working group to create the legislation that is now the Utah Charter School Enhancement Program and my employer, Verapath Global Investing is one of three approved financial advisors allowed to work with the Utah State Charter School Finance Authority. I've worked closely with Marlies Burns and her staff as well as the staff at the UAPCS. I feel my skills and background with many Utah charter schools provides a helpful perspective and insight to this school moving forward.

### **Not-for-Profit History:**

I have been involved with the Great Salt Lake Council of the Boys Scouts of America on their endowment committee. I've also worked closely with multiple charter schools in Utah and have a strong sense for the budgeting and financial sense successful schools need to employ.

### **Employment History:**

I was a municipal bond trader and underwriter for Wells Fargo for 11 years and have worked at Verapath Global Investing for 5 years. My background should strongly support a charter school.

### **Education History:**

I hold degrees in accounting and finance from the University of Utah, 2002, and an MBA with a certificate in finance from Westminster College, 2007.

WITH THE SIGNATURE BELOW, PERMISSION IS HEREBY GRANTED TO VERIFY ANY INFORMATION PROVIDED ABOVE FOR Ivy Preparatory Academy.

I AFFIRM THAT THE INFORMATION PRESENTED HEREIN IS TRUE AND CORRECT TO THE BEST OF MY KNOWLEDGE.

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**Applicant's Signature**

## BACKGROUND INFORMATION SHEET

Provide the following information on each startup board member and any individuals responsible for the day-to-day operation of the school who have already been identified. Complete this form, do not include a resume. This page may be copied as many times as necessary.\*

Name Dena Lundgreen

Role with school Executive Director

Expertise Education

**Statement of Intent:** I am committed to serving IPA as the Executive Director and to building an excellent Waldorf-inspired public school worthy of its community. My expertise in teaching and learning will guide me in implementing and showing fidelity to the Waldorf curriculum based in Rudolf Steiner's ideal of individualized, kinesthetic, arts integrated and developmentally driven education. I am dedicated to building a school culture that values the emotional, social, and intellectual wellbeing of every child and one that is respectful and collaborative within its staff. My training in Educational Leadership reinforces my dedication and competency as IPA's instructional leader, staff developer, organizational manager, and community collaborator. I am dedicated to working with the Governing Board to keep IPA, fiscally sound, academically strong, legally compliant, and a desirable educational choice for parents and students.

**Not-for-Profit History:** I served as an intern for the American Cancer Society where I promoted the organization and its programs within the community. As a social worker for Early Head Start, I worked with low-income families and children with disabilities. My main responsibilities were conducting needs assessments, creating strategic plans of action, and connecting with other community and social service organizations to support the families within my caseload. During my administrative internship, I worked closely with my mentor principals in creating and adhering to a set budget as well as potential fund raising opportunities.

**Employment History:** I have been in the field of education for over 10 years. Six of those years were spent in charter schools while three were in private schools. I co-created a secondary ESL program for Mount Vernon Academy and hosted several foreign exchange students in my home. As a teacher, I have created, served on, and collaborated with a variety of committees, worked closely with parents, kept and updated legal documents such as IEPs, and helped

create emergency plans.

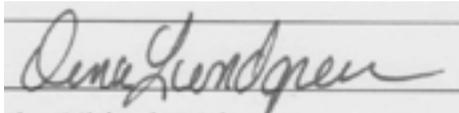
As a social worker for Early Head Start, I built a variety of community partnerships. I was the Lead Content Designer for Waterford Research Institute, a local international curriculum company, where I designed content for a technology-based language arts program serving Title 1, ESL, and low performing students. I managed a small group of educators, computer programmers, and artists. I collaborated with the project manager concerning budget needs and allocation. I am currently a k-3 Literacy Specialist at Redwood Elementary where I coach and mentor teachers, as well as, create and give professional development

**Education History:** BS in psychology - Brigham Young University- graduated May 2004  
MAEd- University of Phoenix – graduated June 2005  
Principal Licensure Certificate – University of Phoenix- graduated June 2015 –UT Admin License to be granted August 2015

I am sufficiently qualified to operate a Waldorf- inspired charter school due to my knowledge of and experience in child/cognitive development, teaching experience in district, private, and charter schools, as well as my training and experience in educational leadership and administration.

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I AFFIRM THAT THE INFORMATION PRESENTED HEREIN IS TRUE AND CORRECT TO THE BEST OF MY KNOWLEDGE.



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**Applicant's Signature**

## Appendix B: Scoring Rubric

STANDARD	Applicant self-evaluation			Evaluators		
	Meets	Partially meets	Does not meet	Meets	Partially meets	Does not meet
<b>SECTION 1: SCHOOL PURPOSE</b>						
A response that meets standard will:						
Identify the purpose(s) of the charter school as outlined in 53A-1a-503.	X					
Present a compelling 1 - 2 sentence mission statement that defines the purpose(s) of the school	X					
Present a coherent and concise vision of what the school will look like in 5 - 10 years if it is achieving its mission	X					
Describe the school's educational foundation and the culture or ethos	X					
Describe the anticipated population of the school, including grades served and requested enrollments	X					
Explain how the proposed mission, curriculum, teaching methods, and services are likely to meet the needs of the target population	X					
Identify the new and creative methods employed by the school to meet the unique learning styles and needs of students, if applying under 53A-1a-501.9	X					
<b>SECTION 2: MARKET ANALYSIS</b>						
A response that meets standard will:						
Describe the education landscape in this community, including specifying clearly what educational goals or programs are not being met currently in the area	X					
Identify all public and private schools within a 5-mile radius of the proposed location (create a map). This will be referred to as the target location	X					
Describe data that points to trends/shifts within target location specific to school selection	X					

STANDARD	Applicant self-evaluation			Evaluators		
	Meets	Partially	Does not	Meets	Partially	Does not
Provide the characteristics of the proposed charter school that sets it apart from others in target	X					
demonstrate how its proposed locations meet the definition of "high growth area," if applying under 53a-	n/a					
<b>SECTION 3: PROGRAM OF INSTRUCTION</b>						
A response that meets standard						
Align with the school's mission, vision, and overall educational priorities	X					
If replicating an existing school design:						
Provide sufficient evidence the replicated design has been effective and successful in raising student achievement	X					
Identify specific successful practices	X					
Commit to a high level of fidelity to the successful model and minimize "tinkering" with the model until achieving acceptable	X					
Describe the applicant's capacity to replicate an existing school design	X					
If using developed curricula:						
Identify the school's philosophical approach to educating students	X					
Ensure that educational priorities are meaningful, manageable, and measureable, and focus on improving	X					
Show the selected curricula is consistent with the school's mission, vision, and educational program design	X					
If creating own curricula:						
Present a viable plan for development of the curricula for core academic areas and for ensuring alignment with the Utah Core Curriculum and Core Standards	n/a					

STANDARD	Applicant self-evaluation			Evaluators		
	Meets	Partially meets	Does not meet	Meets	Partially meets	Does not meet
Describe the framework for development of the curricula for core subjects and identify sound research, experience or theoretical base, and foundational materials that will guide curriculum development	n/a					
If focusing on career education:						
Present a compelling rationale consistent with business and industry needs, student interests, and advisory committee recommendations	n/a					
If focusing on career education:						
Present a compelling rationale consistent with business and industry needs, student interests, and advisory committee recommendations	n/a					
Identify major methods of instructional delivery and post-secondary and business partners	n/a					
Include a convincing plan for transitioning students to work, further training, or higher education	n/a					
If offering a distance and/or online education program will include:						
A description of how the school will use technology to provide its curriculum and deliver instruction using the internet or other electronic means	n/a					
The manner in which properly licensed and endorsed teachers will deliver instruction, assess academic progress, and communicate with students to provide assistance	n/a					
The methods to be used to ensure authenticity of student work and adequate proctoring of assessments	n/a					
The types and frequency of communication between the school and the students and the manner in which the school will communicate with parents	n/a					

STANDARD	Applicant self-evaluation			Evaluators		
	Meets	Partially meets	Does not meet	Meets	Partially meets	Does not meet
If focusing on gifted education:						
Contain written procedures to systematically identify and serve students identified as academically advanced in all grades	n/a					
Provide a curriculum for the gifted education program that is intellectually and affectively engaging and is taught in a meaningful context	n/a					
If offering early college:						
Present a plan for college or university affiliation that is likely to further the school's mission, vision, and educational program	n/a					
Demonstrate a substantial likelihood that the school will be successful in establishing the proposed affiliation and the college or university has the capacity and commitment to fulfill its anticipated role	n/a					
A response that meets standard will: <b>SECTION 4: PERFORMANCE MEASURES</b>						
Align with the school's mission and educational program	X					
Define measures, metrics, and targets that are SMART	X					
Set high standards for student learning	X					
Present a clear, credible, and sound plan for measuring and reporting the educational performance and progress of individual students, subgroups, and the school as a whole, including valid and reliable measures	X					
Explain how the school will use assessment data to drive key decisions aimed at improving academic outcomes	X					
	Applicant self-evaluation			Evaluators		

STANDARD	<i>Meets</i>	<i>Partially meets</i>	<i>Does not meet</i>	<i>Meets</i>	<i>Partially meets</i>	<i>Does not meet</i>
If serving educationally disadvantaged students:						
Present performance measures that are a valid and reliable means for determining whether students are meeting performance standards	n/a					
Ensure that the school will be held to the same performance standards as other public schools	n/a					
Specify the time frame in which students will be expected to meet the performance standards	n/a					
Show compliance with all federal accountability standards	n/a					
<b>SECTION 5: GOVERNANCE</b>						
A response that meets standard will:						
Demonstrate the board has the capacity to found and sustain a quality school	x					
Include background information sheet for each named board member	x					
Establish the governing board's capacity to oversee the successful development and implementation of the education program presented in this proposal	x					
Ensure the governing board is aware and follows Utah's Open & Public Meetings Act in conducting board and committee business	x					
Illustrate the governing board's capacity to oversee the effective and responsible management of public funds	x					
Illustrate the governing board's capacity to be responsible for the school's compliance with its legal obligations	x					
Illustrate the governing board's capacity to represent the community well	x					

### Appendix C: Works Cited

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