



## **REGULAR MONTHLY BOARD MEETING**

**March 25, 2014**

**7:00 P.M.**

**Educational Support Center  
Board Meeting Room  
3600-52<sup>nd</sup> Street  
Kenosha, Wisconsin**

*This page intentionally left blank*



- I. Pledge of Allegiance
- II. Roll Call of Members
- III. Awards/Recognition
  - STEP Program Staff at Boys & Girls Club
- IV. Administrative and Supervisory Appointments
- V. Introduction and Welcome of Student Ambassador
- VI. Legislative Report
- VII. Views and Comments by the Public
- VIII. Response and Comments by Board Members (Three Minute Limit)
- XI. Remarks by the President
- X. Superintendent's Report
- XI. Consent Agenda
  - A. Consent/Approve Recommendations Concerning Appointments, Leaves of Absence, Retirements and Resignations..... Page 1
  - B. Consent/Approve Minutes of 2/20/14, 2/25/14, 3/7/14 and 3/8/14 Special Meetings and Executive Sessions, and 2/25/14 Regular Meeting ..... Pages 2-16
  - C. Consent/Approve Summary of Receipts, Wire Transfers and Check Registers .... Pages 17-24
- XII. Old Business
  - A. Discussion/Action Policy and Rule 5240 – Accommodation of Private School and Home Based Educational Program Students ..... Pages 25-27 (Second Reading)

# SCHOOL BOARD AGENDA

Page 2

March 25, 2014

## XII. Old Business - Continued

- B. Discussion/Action Policy 6520 – Field/Co-Curricular Trips ..... Pages 28-29  
(Second Reading)
- C. Discussion/Action School Board Policy 8720 - Special School Board Meetings ..... Pages 30-31  
(Second Reading)
- D. Discussion/Action Mary Frost Ashley Charitable TrustÁ..... Pages 32-38
- E. Discussion/Action Read to Lead Grant Request Á..... Pages 39-42
- F. Discussion/Action Head Start Federal Grant And Cost of Living Adjustment Request ..... Pages 43-49
- G. Discussion/Action Equipment Use for Softball and Baseball ..... Pages 50-51
- H. Discussion/Action Ellevation Proposal ..... Pages 52-82
- I. Discussion/Action Middle School Honors ..... Pages 83-127
- J. Discussion/Action Report of Contracts in Aggregate of \$25,000 ..... Pages 128-134

## XIII. New Business

- A. Discussion/Action Disaster Recovery/Data Archiving Technology Upgrade ..... Pages 135-136
- B. Discussion/Action Donations to the District..... Page 137

## XIV. Other Business as Permitted by Law

- Tentative Schedule of Reports, Events and Legal Deadlines For School Board (March-April)..... Page 138

## XV. Predetermined Time and Date of Adjourned Meeting, If Necessary

## XVI. Adjournment

**Kenosha Unified School District****Kenosha, WI****March 25, 2014**

The Human Resources recommendations regarding the following actions:

<b>ACTION</b>	<b>LAST NAME</b>	<b>FIRST NAME</b>	<b>SCHOOL/DEPT</b>	<b>POSITION</b>	<b>STAFF</b>	<b>DATE</b>	<b>FTE</b>	<b>SALARY</b>
Appointment	Kwasinski	Steven	Tremper High School	Technology Education	Appointment	03/07/2014	1	\$38,377.00
Appointment	Strohkirch	Dedra	Jeffery Elementary School	Special Education-CDS	Appointment	02/17/2014	1	\$45,183.00
Early, Early Retirement	Marcinkus	Mary	HR Leave Status	HR Teacher on Leave	Early, Early Retirement	02/24/2014	1	\$76,934.00
Early, Early Retirement	Wojnicz	Jodie	Vernon Elementary School	L.D.	Early, Early Retirement	07/19/2014	1	\$76,934.00
Early, Early Retirement	Johnson	Therese	Lance Middle School	E.D.	Early, Early Retirement	06/12/2014	1	\$72,433.00
Resignation	Lange	Kelly	Lance Middle School	Special Education	Resignation: New Job	03/07/2014	1	\$15.71
Resignation	Tenner	Mylai	EBSOLA-Creative Arts	Behavior Interventionist	Resignation/Personal	03/28/2014	1	\$52,310.00
Retirement	Mc Beth	Mary	HR Leave Status	Teacher on Leave	Retirement	05/01/2014	1	\$76,934.00

*This page intentionally left blank*

SPECIAL MEETING & EXECUTIVE SESSION  
OF THE KENOSHA UNIFIED SCHOOL BOARD  
HELD ON FEBRUARY 20, 2014

A special meeting of the Kenosha Unified School Board was held on Thursday, February 20, 2014, in the Board Room at the Educational Support Center. The purpose of this meeting was to vote on holding an executive session to follow immediately.

The meeting was called to order at 5:15 P.M. with the following members present: Mrs. Taube, Mr. Flood, Mrs. Snyder, Mrs. Coleman, Mr. Bryan, and Ms. Stevens. Dr. Mangi and Mrs. Glass were also present. Mr. Nuzzo was excused.

Ms. Stevens, President, opened the meeting by announcing that this was a special meeting of the School Board of the Kenosha Unified School District. Notice of this special meeting was given to the public by forwarding a copy of the notice to all requesting radio stations and newspapers.

Ms. Stevens announced that an executive session had been scheduled to follow this special meeting for the purpose of Personnel: Employment Relationship, Problems, Position Assignments, and Compensations and/or Contracts.

Mr. Flood moved that the executive session be held. Mr. Bryan seconded the motion.

Roll call vote. Ayes: Mrs. Taube, Mr. Flood, Mrs. Snyder, Mrs. Coleman, Mr. Bryan, and Ms. Stevens. Noes: None. Unanimously approved.

Mrs. Snyder moved to adjourn to executive session. Mr. Bryan seconded the motion. Unanimously approved.

1. Personnel: Employment Relationship, Problems, Position Assignments, and Compensations and/or Contracts.

Board members discussed a personnel issue.

Mr. Flood left the meeting at 5:45 P.M. and returned at 6:05 P.M.

Board members reviewed and discussed information pertaining to the Superintendent Search.

Meeting adjourned at 8:30 P.M.

These minutes were composed from notes taken by Mrs. Taube.

Stacy Schroeder Busby  
School Board Secretary

SPECIAL MEETING & EXECUTIVE SESSION  
OF THE KENOSHA UNIFIED SCHOOL BOARD  
HELD ON FEBRUARY 25, 2014

A special meeting of the Kenosha Unified School Board was held on Tuesday, February 25, 2014, in the Board Room at the Educational Support Center. The purpose of this meeting was to vote on holding an executive session to follow immediately.

The meeting was called to order at 5:10 P.M. with the following members present: Mrs. Taube, Mr. Flood, Mrs. Snyder, Mrs. Coleman, Mr. Bryan, and Ms. Stevens. Dr. Mangi was also present. Mr. Nuzzo arrived later.

Ms. Stevens, President, opened the meeting by announcing that this was a special meeting of the School Board of the Kenosha Unified School District. Notice of this special meeting was given to the public by forwarding a copy of the notice to all requesting radio stations and newspapers.

Ms. Stevens announced that an executive session had been scheduled to follow this special meeting for the purpose of Litigation and Personnel: Employment Relationship, Problems, Position Assignments, and Compensation and/or Contracts.

Mrs. Coleman moved that the executive session be held. Mr. Flood seconded the motion.

Roll call vote. Ayes: Mrs. Taube, Mr. Flood, Mrs. Snyder, Mrs. Coleman, Mr. Bryan, and Ms. Stevens. Noes: None. Unanimously approved.

Mrs. Coleman moved to adjourn to executive session. Mr. Flood seconded the motion. Unanimously approved.

1. Personnel: Employment Relationship, Problems, Position Assignments, and Compensation and/or Contracts

Mrs. Sheronda Glass, Executive Director of Business Services, arrived at 5:11 P.M. and informed the Board of several personnel issues.

Mr. Nuzzo arrived at 5:21 P.M.

Mrs. Glass updated Board members on several position assignments.

Mrs. Glass provided Board members with information pertaining to the Superintendent Search and updated them on the status.

2. Litigation

Attorney JoAnn Hart, from Boardman & Clark, LLP, arrived at 6:11 P.M. and updated Board members on a pending legal matter. She responded to questions from Board members and sought direction.



Meeting adjourned at 7:05 P.M.

Stacy Schroeder Busby  
School Board Secretary

REGULAR MEETING OF  
THE KENOSHA UNIFIED SCHOOL BOARD  
HELD FEBRUARY 25, 2014

A regular meeting of the Kenosha Unified School Board was held on Tuesday, February 25, 2014, at 7:00 P.M. in the Board Room of the Educational Support Center. Ms. Stevens, President, presided.

The meeting was called to order at 7:17 P.M. with the following Board members present: Mrs. Taube, Mr. Flood, Mr. Nuzzo, Mrs. Snyder, Mrs. Coleman, Mr. Bryan, and Ms. Stevens. Dr. Mangi was also present.

Ms. Stevens, President, opened the meeting by announcing that this was a regular meeting of the School Board of Kenosha Unified School District. Notice of this regular meeting was given to the public by forwarding the complete agenda to all requesting radio stations and newspapers. Copies of the complete agenda are available for inspection at all public schools and at the Superintendent's office. Anyone desiring information as to forthcoming meetings should contact the Superintendent's office.

Dr. Bethany Ormseth, Interim Assistant Superintendent of Secondary School Leadership, presented the National Soccer Coaches Association of America Academic All American Team Award, the 2013 Academic All State Team Boys Cross Country Division 1 Awards, the School First Attendance Campaign Awards, and a Veteran Diploma. She introduced Mr. Scott Plank, Coordinator of Fine Arts, and he presented the Wisconsin State Theater Festival Awards.

There were no Administrative and/or Supervisory appointments.

Mrs. Coleman introduced the Student Ambassador, Tonaya Gulley, from Tremper High School and she made her comments.

Mr. Bryan presented the Legislative Report.

There were views and comments by the public.

Board members made their responses and comments.

Ms. Stevens made her Board President remarks.

Dr. Mangi presented the Superintendent's Report.

The Board considered the following Consent-Approve items:

Consent-Approve item XI-A – Recommendations Concerning Appointments, Leaves of Absence, Retirements, and Resignations as contained in the agenda.

Consent-Approve item XI-B – Minutes of the 1/30/14 Special Meeting, 2/04/14 Special Meeting and Executive Session, and the 2/04/14 Regular Meeting.

Consent-Approve item XI-C – Summary of Receipts, Wire Transfers, and Check Registers submitted by Ms. Heather Kraeuter, Accounting & Payroll Manager; Mr. Hamdan, Interim Chief Financial Officer, and Dr. Joseph Mangi, excerpts follow:

“It is recommended that the January 2014 cash receipt deposits totaling \$305,297.99 and cash receipt wire transfers-in totaling \$40,339,101.49, be approved.

Check numbers 503365 through 504326 totaling \$7,508,396.14, and general operating wire transfers-out totaling \$253,331.44 are recommended for approval as the payments made are within budgeted allocations for the respective programs and projects.

It is recommended that the January 2014 net payroll and benefit EFT batches totaling \$14,022,818.04 and net payroll check batches totaling \$6,892.42 be approved.”

Mrs. Taube moved to approve the Consent Agenda as contained in the agenda. Mrs. Coleman seconded the motion. Unanimously approved.

Mr. Hamdan and Mrs. Lisa Salo of Schneck presented the 2012-2013 Financial Audit Report submitted by Ms. Kraeuter, Mr. Hamdan, and Dr. Mangi, excerpts follow:

“The District’s Auditor, Schenck SC, has concluded their financial audit of the District’s financial statements. The Audit, Budget and Finance Committee reviewed the audited financials at the January 14, 2014 meeting, and had the opportunity to ask questions. Ms. Lisa Salo from Schenck was on hand to answer questions and provided a report to the committee. It was the opinion of Schenck that the District’s financial statements “...present fairly, in all material respects, the respective financial position of the governmental activities, the business-type activities, each major fund, and the aggregate remaining fund information of the District as of June 30, 2013, and the respective changes in financial position and where applicable, cash flows thereof for the year ended in conformity with accounting principles generally accepted in the United States of America.” The full Annual Financial Report is available on the District’s website.

Lisa Salo of Schenk SC will be available for questions or discussion at the February 25, 2014 School Board meeting, however no formal action is required other than acknowledgement of receipt of the audit results.”

No formal action was required. The Board acknowledged receipt of the audit results.

Mr. Nuzzo moved that agenda item XIII-C – Possible Censure of School Board Member Kyle Flood be moved up in the agenda and addressed next. Mrs. Coleman seconded the motion. Motion passed. Mr. Flood abstaining.

Ms. Stevens passed the gavel to Mrs. Taube.

Ms. Stevens moved that Kyle Flood be censured because he received a municipal citation for having drug paraphernalia found in his dorm room at U.W. Parkside. Mrs. Coleman seconded the motion. Motion passed. Mr. Flood abstaining.

Mrs. Taube returned the gavel to Ms. Stevens.

Mr. Patrick Finnemore, Director of Facilities, presented the 2014-2015 Capital Projects Plan submitted by Mr. John Setter, Project Architect; Mrs. Cindy Gossett, Director of Food Services; Mr. Finnemore; and Dr. Mangi, excerpts follow:

“Board Policy 3711 requires that a major maintenance project list be developed annually by the Department of Facilities Services and that the list be reviewed by the Planning, Facilities, and Equipment Committee and taken to the School Board for action no later than April 1st of each year. This report includes the proposed major maintenance and energy savings projects plans for 2014-15 as well as a proposed project in the Central Kitchen.

The overall major maintenance plan is updated on a regular basis with annual evaluations of each project on the list by the Facilities Department. The plan includes “place marks” for annual-type projects, which include roof, exterior envelop, asphalt/concrete, and flooring replacements. Each project is prioritized by the Facilities Department based, in-part, on the priority system detailed in the Board Policy. Generally, this report also includes the capacity projects as required by Board Policy 7210; however there are no capacity projects proposed for the coming year.

The major maintenance budget is \$2,000,000; however, \$500,000 will be used to continue to pay off the loan used to fund the Reuther masonry restoration project, and an additional \$500,000 will be used to fund security improvements at all of our facilities. The three-year security project and related funding was approved by the Board at the June 25, 2013 meeting. This leaves \$1,000,000 for major maintenance projects this year.

This report was reviewed by the Planning, Facilities, and Equipment Committee at the February 11, 2014 meeting, and the Committee unanimously recommended that it be forwarded on to the full Board for consideration.

Administration recommends School Board approval of the 2014-15 Capital Projects Plan as described in this report.”

Mrs. Coleman moved to approve the 2014-2015 Capital Projects Plan as contained in the agenda. Mr. Nuzzo seconded the motion. Unanimously approved.

Mr. Robert Hofer, Purchasing Agent, presented the Report of Contracts in Aggregate of \$25,000 submitted by Mr. Hofer, Mr. Haman, and Dr. Mangi, excerpts follow:

“School Board Policy 3420 requires that “all contracts and renewals of contracts in aggregate of \$25,000 in a fiscal year shall be approved by the School Board except in the event of an emergency as determined and reported to the School Board monthly by the Purchasing Agent.”

The contracts/agreements in aggregate of \$25,000 that have been added to the Contract Management Database subsequent to January 28, 2014, with approval of the purchasing agent are shown in the database in coral color. Board members may access this database while on district property.

The following contracts/agreements have not been added to the Contract Management Database are being presented to the Board at this time for Board Approval:

- Achieve 3000 – Differentiated Literacy Solution;
- The Flippen Group – Capturing Kids’ Hearts Staff Training; and
- Solution Tree – Professional Learning Communities Institute.”

Mrs. Taube moved to approve the addition of Achieve 3000 and The Flippen Group to the Contract Management Database but hold on the approval of Solution Tree until complete contract rationale information is provided. Ms. Stevens passed the gavel to Mrs. Taube and seconded the motion. Discussion followed. Mrs. Taube withdrew her motion.

Mrs. Taube returned the gavel to Ms. Stevens.

Mrs. Snyder moved to approve the recommended contracts/agreements noted in the agenda in aggregate of \$25,000. Mrs. Taube seconded the motion. Motion carried. Mr. Flood and Mr. Bryan dissenting.

Ms. Stevens introduced School Board Policy 8720 – Special School Board Meetings submitted by Mr. Flood, excerpts follow:

“Mr. Flood’s Rationale: Bob Nuzzo and myself tried this at a board meeting and were told that it was against policy. This will increase communication, transparency and accountability for the Board.

At the January 25, 2014, regular board meeting, it was unanimously approved to table revisions to Policy 8720 until the February 25, 2014, meeting.”

Mrs. Taube moved to defer action on School Board Policy 8720 – Special School Board Meetings until April when the entire 8000 policy series is reviewed. Ms. Stevens passed the gavel to Mrs. Taube and seconded the motion. Mrs. Taube returned the gavel to Ms. Stevens.

Roll call vote. Ayes: Mrs. Taube, Mr. Bryan, and Ms. Stevens. Noes: Mr. Flood, Mr. Nuzzo, Mrs. Snyder, and Mrs. Coleman. Motion failed.

Mr. Flood moved to approve School Board Policy 8720 – Special School Board Meetings as a first reading with the addition of ““with the exception to any contradiction to any policy” at the end of the fourth paragraph. Mr. Nuzzo seconded the motion. Motion passed. Mrs. Taube, Mr. Bryan, and Ms. Stevens dissenting.

Ms. Stevens presented School Board Policy 6520 – Field/Co-Curricular Trips submitted by Dr. Sue Savaglio-Jarvis, Assistant Superintendent of Teaching and Learning, and Dr. Mangi, excerpts follow:

“Kenosha Unified School District lies in a unique location with many wonderful learning opportunities for students within the city limits as well as outside of the city and state limits. The Board of Education requested that the Department of Teaching and Learning review current School Board Policy 6520 - Field/Co-Curricular Trips to ensure it meets the needs of staff and students when considering an extended learning opportunity off school grounds. The request also included a close examination of Kenosha Public Museums in regards to their alignment with Kenosha Unified’s curriculum and standards.

Kenosha Unified School District’s School Board Policy 6520 highlights the importance of providing extensions within the learning environment to enhance student learning. The following link (<http://www.kusd.edu/docs/EducProgServ.pdf>) provides a closer examination of the current educational programs and services provided by the Kenosha Public Museums.

Upon review, the current policy as written is properly worded in order for district staff to adequately address field trips and offer extending and enriching off campus learning opportunities for all students. Upon further review, the educational programs and services being offered by the Kenosha Public Museums meet Kenosha Unified standards and curriculum.

At the February 11, 2014 Joint Personnel/Policy & Curriculum/Program Standing Committee meeting, Administration recommended that wording in current Board Policy 6520 be retained and to encourage the many wonderful learning opportunities inside the city limits as well as outside the city and state limits for student growth and learning. Kenosha Public Museums would be an enriching and engaging opportunity for students as the current educational programs and services offered via the museums are aligned to current grade (kindergarten through eighth) standards and curriculum. The joint committee voted to forward Policy 6520 to the full Board for consideration of a minor word change in paragraph two.

Administration recommends that the Board approve revised Policy 6520 – Field/Co-Curricular Trips as a first reading this evening and a second reading at the March 25, 2014, regular meeting.”

Mr. Bryan moved to approve School Board Policy 6520 - Field/Co-Curricular Trips as a first reading. Mrs. Stevens passed the gavel to Mrs. Taube and seconded the motion. Unanimously approved.

Mrs. Taube returned the gavel to Ms. Stevens.

Ms. Stevens presented School Board Policy 8712 – School Board Meeting Agenda Preparation and Dissemination submitted by Mr. Flood, excerpts follow:

“Mr. Flood’s Rationale: This change will reduce the feeling of being unprepared to vote by Board members.

At the January 28, 2014, regular meeting, Policy/Rule 8712 was approved on a first reading with the eliminated wording in the second paragraph reinstated.”

Mr. Food moved to approve School Board Policy 8712 – School Board Meeting Agenda Preparation and Dissemination as a second reading. Mrs. Taube seconded the motion. Unanimously approved.

Dr. Mangi presented School Board Policy 1610 – Registered Sex Offender submitted by Mrs. Glass, Executive Director of Business, and Dr. Mangi, excerpts follow:

“2013 Wisconsin Act 88 (Act 88) requires the registered sex offender to notify the District Administrator ( Superintendent) or his/her designee (Administrator) of the specific date, time and place of the visit and his/her status as a registered sex offender. This new law, which is effective as of December 15, 2013, prohibits registered sex offenders from being in any school building, on any school grounds, school recreation area, or school athletic field, or on any school property owned, used, or operated for school administration unless the registered sex offender notifies the Administrator.

During discussion at the January 14, 2014, Personnel/Policy Committee meeting, a number of questions were raised regarding off-site programs, Registrant notification, contracted employees and requirements of local law enforcements and/or child welfare agencies providing notification. The policy was sent back to legal counsel to provide direction as it relates to the concerns raised. The updated policy is provided for your consideration.

At its February 11, 2014, meeting, the Personnel/Policy Standing Committee voted to forward the registered sex offender policy to the School Board for a first and second reading. Administration recommends that the School Board approve new Policy 1610 - Registered Sex Offender as a simultaneous first and second reading this evening.”

Mr. Bryan moved to approve School Board Policy 1610 – Registered Sex Offender as a simultaneous first and second reading. Mr. Flood seconded the motion. Unanimously approved.

Dr. Mangi presented School Board Policy/Rule 5240 – Accommodation of Private School and Home Based Educational Program Students submitted by Mr. Kristopher Keckler, Executive Director of Information & Accountability, and Dr. Mangi, excerpts follow:

“Policy and Rule 5240 – Accommodation of Private School and Home Based Educational Program Students provides limited enrollment options for Kenosha resident students who are enrolled full time in a private school or home based (homeschool) setting. Act 20 (2013) greatly expanded the opportunities for resident and non-resident homeschooled pupils. Act 20 and the new part-time attendance law (Wis. Stats 118.53) allow homeschooled pupils in any grade to attend any public school on a part-time basis. The previous rule was limited to just resident students in high school grades. A school district is required, space permitting, to allow resident and non-resident homeschooled pupils to take up to two (2) courses per semester at any public school. Pupils must satisfy the minimum standards for admission to a course offered by the school district. The school board of a district shall determine the minimum standards for admission to a course offered by the school district at each grade.

Kenosha resident students who are enrolled full time in a private school are still limited to part time KUSD enrollment at grades 9-12. This option was not changed by the recent legislation. All students participating under the revised rule will be factored into the district membership report for state aid reporting. KUSD Policy and Rule 5240 needs to align with the updated state requirements.

At the February 11, 2014, joint Personnel/Policy and Curriculum/Program Committee meeting, it was voted to forward revised Policy/Rule 5240 to the full Board for consideration. Administration recommends that the School Board approve as a first reading proposed revisions to Policy and Rule 5240 – Accommodation of Private School and Home Based Educational Program Students as presented this evening and that it be brought back for a second reading at the March 25, 2014, regular school board meeting.”

Mr. Flood moved to approve School Board Policy/Rule 5240 – Accommodation of Private School and Home Based Educational Program Students as a first reading and that it be brought back for a second reading at the March 25, 2014, regular school board meeting. Mrs. Taube seconded the motion. Unanimously approved.

Mr. Steven Knecht, Coordinator of Athletics/Physical Education presented the Hockey Cooperative Team Expansion submitted by himself, Dr. Savaglio-Jarvis, and Dr. Mangi, excerpts follow:

“In the 2001-02 school year, Kenosha Unified School District began sponsoring hockey as a co-op team. The original members of the co-op team were Tremper High School and Bradford High School. Since then Indian Trail High School was added to the co-op. From the existence of the program, the team has been recognized as the Kenosha Thunder.

During the 2011-12 school year, interest in expanding the co-op was explored as the number of participants had dipped; and citizens from the neighboring communities of Wilmot and Westosha expressed interest in joining the Kenosha Thunder. However, there are date requirements for applications into the co-op team agreements; and timing proved to be an obstacle. Additionally, specific information surrounding the agreement in a co-op needed to be ascertained. As a result, students from Wilmot and Westosha did not join the co-op in 2011-12.

In February 2013 Wilmot Union High School moved forward with approval from their school board and, with the approval of the Kenosha Unified School District Board of Education, became a member of the Kenosha Hockey Co-op in the 2013-14 school year. During the 2012-13 standing committee meetings and school board meetings, it was stated that in 2014 Westosha Central High School would most likely be ready to move forward and ask to be part of the Kenosha Hockey Co-op; and they have done so. Appropriate information has been shared (financials, code of conduct, etc.), and Westosha Central School District has approved Westosha Central High School to co-op in hockey with Kenosha Unified School District and the Kenosha Thunder hockey team. Now that this process has been approved by the Westosha Central School District, the WIAA application process requires Kenosha Unified School District approval before it can act upon the request.



The Kenosha Thunder Hockey Co-op Team is running its program but is not near capacity. Adding this fifth Kenosha County high school, will strengthen the program in numbers and add additional opportunities to students in another community. Additionally, and more importantly for Kenosha Unified School District, this is fiscally responsible as it will reduce the cost of hockey for the district. Westosha Central School District will financially support their students in the program.

At its February 11, 2014, meeting the Curriculum/Program Committee voted to forward this report to the School Board for consideration. Administration recommends that the School Board grant approval to expand the district's hockey program into a co-op agreement with Westosha Central School District beginning in the 2014-15 school year."

Mr. Flood moved to approve the expansion of the district's hockey program into a co-op agreement with Westosha Central School District beginning in the 2014-15 school year. Mr. Nuzzo seconded the motion. Unanimously approved.

Mr. Knecht presented the Gymnastics Cooperative Team Expansion submitted by himself, Dr. Savaglio-Jarvis, and Dr. Mangi, excerpts follow:

"In 1982 the Wisconsin Interscholastic Athletic Association (WIAA) made an amendment to their constitution, bylaws, and rules of eligibility which permitted member schools to have cooperative teams (co-op teams). Co-op teams permitted member schools to join together and support an athletic program in order to have a team exist.

In the 1993-94 school year, Kenosha Unified School District began sponsoring gymnastics as a co-op team. The original members of the co-op team were Tremper High School and Bradford High School. Since then Indian Trail High School was added to the co-op. From the existence of the program, the team has been recognized as the Kenosha Combined Gymnastics Team.

During summer 2013 the Westosha Central High School Athletic Department contacted the Kenosha Unified School District Office of Athletics/Physical Education about a gymnastics co-op between the district's combined team and Westosha Central High School. Due to time-lines with the WIAA, this opportunity cannot be afforded for this school year but could be made possible beginning with the 2014-15 school year.

Appropriate information has been shared (financials, code of conducts, etc.), and Westosha Central School District has approved Westosha Central High School to co-op in gymnastics with Kenosha Unified School District and the Kenosha Combined Gymnastics Team. Now that this process has been approved by the Westosha Central School District, the WIAA application process requires Kenosha Unified School District approval before it can act upon the request.

The Kenosha Combined Gymnastics Team is running its program but is not near capacity. Numbers in both programs in Kenosha and in Westosha are low, and combining Kenosha's team with Westosha Central would provide stability to the district's programs and continue to give its female athletes a sport to compete in during the winter. Additionally, and more importantly for Kenosha Unified School District, this is fiscally responsible change as it

will reduce the cost of gymnastics for the district. Westosha Central School District will financially support their students in the program.

At its February 11, 2014, meeting, the Curriculum/Program Standing Committee voted to forward this report to the School Board for consideration. Administration recommends that the School Board grant approval to expand the district's gymnastics program into a co-op agreement with Westosha Central School District beginning in the 2014-15 school year."

Mrs. Coleman moved to defer the Gymnastics Cooperative Team Expansion until the March Board meeting. Mr. Nuzzo seconded the motion. Motion failed. Mrs. Taube, Mr. Nuzzo, Mrs. Snyder, Mr. Bryan, and Ms. Stevens dissenting.

Mrs. Taube moved to approve the expansion of the district's gymnastics program into a co-op agreement with Westosha Central School District beginning in the 2014-15 school year. Mr. Bryan seconded the motion. Motion carried. Mr. Flood and Mrs. Coleman dissenting.

Dr. Mangi presented the Request to Submit the 21<sup>st</sup> Century Community Learning Center (CLC) Program Grant Application for the 2014-2015 School Year submitted by Mrs. Julie Housaman, Director of Title Programs; Mr. Keckler; and Dr. Mangi, excerpts follow:

"The 21st Century Community Learning Center (CLC) Program is a federally funded grant program. Federal guidelines state that funds for the CLC program are distributed to the state level and then allocated to communities based on an extremely competitive process to offer out-of-school time programming. Grants awarded under this competition will range from \$50,000 up to \$100,000 per CLC site. Activities are intended to serve students at schools with high poverty rates and schools in need of improvement based on the results of the Wisconsin Knowledge and Concepts Examination. Funds are allocated to the school district for fiscal and program management.

All CLC programs within the Kenosha Unified School District will continue to provide a safe-haven for children during out-of-school time. Out-of-school time includes before school, after school, early release days, and half days. The combination of academic support, a nutritious snack, and a host of enrichment activities allows for a great partnership with community based organizations like the Boys and Girls Club of Kenosha, the University of Wisconsin-Extension, Crossway Community Church and the Kenosha County Department of Human Services. Each of these primary partners participates in a CLC Advisory Council.

At the February 11, 2014, Audit/Budget/Finance and Curriculum/Program Committee meetings, it was voted to forward the CLC Program grant to the full board for approval. Administration recommends that the School Board grant approval for submission and acceptance of the 21<sup>st</sup> Century Community Learning Center (CLC) Program Grant Application for 2014-2015 School Year."

Mrs. Coleman moved to approve the submission and acceptance of the 21st Century Community Learning Center (CLC) Program Grant Application for 2014-2015 School Year. Mrs. Taube seconded the motion. Unanimously approved.

Mrs. Taube moved to approve agenda items XII(L) through XII(R) under Old Business (Rosetta Stone, New Course Proposal: Advanced Placement Art History, New Course Proposals: Advanced Placement Physics 1 and 2, New Course Proposal: Advanced Placement Human Geography; New Course Proposal: Teen Leadership; and Gateway Transcribed Course Proposal: Accounting Principles). Mrs. Coleman seconded the motion. Unanimously approved.

Ms. Stevens presented Policy 8870 – Public Participation at School Board Meetings, excerpts follow:

“The following changes are recommended to Policy 8870 to comply with a legal settlement agreement:

Citizen comments and questions at any Board meeting may deal with any topic related to District issues or concerns and/or the Board's agenda. However in public session, the Board shall not hear irrelevant, repetitive, abusive, or harassing speech, or speech that causes disruption to the orderly conduct of the meeting. The Board also shall not hear discussion of confidential personnel disputes or grievances involving individual school employees that do not implicate issues of public concern, or individual student disciplinary matters, as there are other channels available in the District that provide for consideration and disposition of such matters. The Board president may set time limits and other administrative requirements as appropriate on the public's participation at Board meetings.

It is recommended that revised School Board Policy 8870 – Public Participation at School Board Meetings be approved as a simultaneous first and second reading this evening.”

Mrs. Taube moved to approve Policy 8870 - Public Participation at School Board Meetings simultaneously as a first and second reading. Mr. Flood seconded the motion. Unanimously approved.

Mrs. Taube presented the Donations to the District as contained in the agenda.

Mrs. Taube moved to approve the Donation to the District as presented. Mr. Flood seconded the motion. Unanimously approved.

Mr. Nuzzo moved to adjourn the meeting. Mr. Bryan seconded the motion. Unanimously approved.

Meeting adjourned at 9:57 P.M.

Stacy Schroeder Busby  
School Board Secretary

SPECIAL MEETING & EXECUTIVE SESSION  
OF THE KENOSHA UNIFIED SCHOOL BOARD  
HELD ON MARCH 7, 2014

A special meeting of the Kenosha Unified School Board was held on Friday, March 7, 2014, in the Birch Room in the Student Union at U.W. Parkside. The purpose of this meeting was to vote on holding an executive session to follow immediately.

The meeting was called to order at 5:12 P.M. with the following members present: Mrs. Taube, Mr. Flood, Mr. Nuzzo, Mrs. Snyder, Mrs. Coleman, Mr. Bryan, and Ms. Stevens. Dr. Mangi was also present.

Ms. Stevens, President, opened the meeting by announcing that this was a special meeting of the School Board of the Kenosha Unified School District. Notice of this special meeting was given to the public by forwarding a copy of the notice to all requesting radio stations and newspapers.

Ms. Stevens announced that an executive session had been scheduled to follow this special meeting for the purpose of Personnel: Evaluation Consideration – Discussion Regarding the Relationship Between the School Board and Superintendent.

Mr. Nuzzo moved that the executive session be held. Mrs. Coleman seconded the motion.

Roll call vote. Ayes: Mrs. Taube, Mr. Flood, Mr. Nuzzo, Mrs. Snyder, Mrs. Coleman, Mr. Bryan, and Ms. Stevens. Noes: None. Unanimously approved.

Mr. Nuzzo moved to adjourn to executive session. Mrs. Coleman seconded the motion. Unanimously approved.

1. Personnel: Evaluation Consideration – Discussion Regarding the Relationship Between the School Board and Superintendent

Dr. Peter Jonas was present and discussed evaluation considerations relative to the Board and the Superintendent.

Meeting adjourned at 9:00 P.M.

These minutes were composed from notes taken by Mrs. Taube.

Stacy Schroeder Busby  
School Board Secretary

SPECIAL MEETING & EXECUTIVE SESSION  
OF THE KENOSHA UNIFIED SCHOOL BOARD  
HELD ON MARCH 8, 2014

A special meeting of the Kenosha Unified School Board was held on Saturday, March 8, 2014, in the Birch Room in the Student Union at U.W. Parkside. The purpose of this meeting was to vote on holding an executive session to follow immediately.

The meeting was called to order at 8:38 A.M. with the following members present: Mrs. Taube, Mr. Flood, Mr. Nuzzo, Mrs. Snyder, Mrs. Coleman, Mr. Bryan, and Ms. Stevens. Dr. Mangi was also present.

Ms. Stevens, President, opened the meeting by announcing that this was a special meeting of the School Board of the Kenosha Unified School District. Notice of this special meeting was given to the public by forwarding a copy of the notice to all requesting radio stations and newspapers.

Ms. Stevens announced that an executive session had been scheduled to follow this special meeting for the purpose of Personnel: Evaluation Consideration – Discussion Regarding the Relationship Between the School Board and Superintendent.

Mr. Nuzzo moved that the executive session be held. Mrs. Coleman seconded the motion.

Roll call vote. Ayes: Mrs. Taube, Mr. Flood, Mr. Nuzzo, Mrs. Snyder, Mrs. Coleman, Mr. Bryan, and Ms. Stevens. Noes: None. Unanimously approved.

Mrs. Snyder moved to adjourn to executive session. Mr. Nuzzo seconded the motion. Unanimously approved.

1. Personnel: Evaluation Consideration – Discussion Regarding the Relationship Between the School Board and Superintendent

Dr. Peter Jonas was present and discussed evaluation considerations relative to the Board and the Superintendent.

Meeting adjourned at 12:08 P.M.

These minutes were composed from notes taken by Mrs. Taube.

Stacy Schroeder Busby  
School Board Secretary

*This page intentionally left blank*

Kenosha Unified School District No. 1  
Kenosha, Wisconsin  
Summary of Cash Receipts and Disbursements  
March 25, 2014

<b>CASH RECEIPTS</b>	reference	total
<b>February 2014 Wire Transfers-In, to Johnson Bank from:</b>		
WI Department of Public Instruction	state aids register receipts	\$ 5,571,345.73
District Municipalities	tax settlement - February payment	22,670,960.48
Johnson Bank	account interest	153.77
US Treasury	interest refund - various bond issues	577,772.33
Bankcard Services (MyLunchMoney.com)	food services credit card receipts (net of fees)	165,472.12
Bankcard Services (TicketSpice.com)	fine arts ticket sales receipts (net of fees)	18,165.18
5/3 Bank (RevTrak)	district web store receipts (net of fees)	36,590.95
Retired & Active Leave Benefit Participants	premium reimbursements	21,690.12
HHS	head start grant	149,871.31
Various Sources	small miscellaneous grants / refunds / rebates	45,772.03
Total Incoming Wire Transfers		\$ 29,257,794.02

**February 2014 Deposits to Johnson Bank - All Funds:**

General operating and food services receipts (excluding credit cards) \$ 2,106,638.54

**TOTAL FEBRUARY CASH RECEIPTS** **\$ 31,364,432.56**

<b>CASH DISBURSEMENTS</b>	reference	total
<b>February 2014 Wire Transfers-Out, from Johnson Bank to:</b>		
<i>payroll &amp; benefit wires</i>		
Individual Employee Bank Accounts	net payrolls by EFT (net of reversals)	\$ 7,076,223.29
WI Department of Revenue	state payroll taxes	627,636.17
WI Department of Revenue	state wage attachments	1,233.99
IRS	federal payroll taxes	2,745,465.63
Diversified Benefits Services	flexible spending account claims	35,691.64
Employee Trust Funds	wisconsin retirement system	1,715,729.38
NVA	vision insurance premiums	10,407.27
Various	TSA payments	311,182.23
<i>general operating wires</i>		
US Bank	purchasing card payment-individuals	265,418.99 *
US Bank	purchasing card payment-AP program	87,906.34 *
Kenosha Area Business Alliance	LakeView lease payment	17,453.54
Johnson Bank	banking fees	726.60
Various	returned checks	132.00
Total Outgoing Wire Transfers		\$ 12,895,207.07

**February 2014 Check Registers - All Funds:**

Net payrolls by paper check Register# 01001DP and 01002DP \$ 4,854.71  
 General operating and food services Check# 504327 thru Check# 505568  
 (net of void batches) 7,585,615.16  
 Total Check Registers \$ 7,590,469.87

**TOTAL FEBRUARY CASH DISBURSEMENTS** **\$ 20,485,676.94**

\*See attached supplemental report for purchasing card transaction information

**KUSD Purchasing Card Program - Individual Cardholders****Transaction Summary by Merchant**

Billing Cycle Ending February 17, 2014

<b>Merchant/Vendor</b>	<b>Total Charge (Credit)</b>
AUER STEEL & HEATING SUPP	\$16,496.85
AMAZON.COM	\$15,278.80
WW GRAINGER	\$13,203.46
HOTEL	\$12,205.04
HIGHWAY C SVC	\$9,939.07
AIRLINE	\$9,551.94
IRIS USA INC	\$8,764.00
FIRST SUPPLY LLC #2033	\$6,985.78
GAPPA SECURITY SOLUTIONS,	\$6,288.40
MENARDS 3127	\$6,191.15
APL*APPLE ONLINE STORE	\$5,264.45
A BEEP, LLC	\$4,909.65
BUY FIRE	\$4,880.00
RESTAURANTS & CATERING	\$4,631.09
HAJOCA ABLE DIST 353	\$4,595.09
AMAZON MKTPLACE PMTS	\$4,592.33
EXPEDIA*EXPEDIA.COM	\$4,549.91
BECKER BOILER CO., INC	\$4,260.79
INDUSTRIAL CONTROLS	\$4,191.43
PAYPAL *WISCONSINED	\$4,160.00
SOLUTION TREE INC	\$3,345.00
MARKS PLUMBING PARTS	\$3,319.61
HYDRO-FLO PRODUCTS INC	\$3,205.17
VEHICLE MAINT. & FUEL	\$3,129.45
STERICYCLE	\$2,998.32
EDIGITALDEALS	\$2,794.51
AIRGAS USA LLC N506	\$2,695.63
CLASS 1 AIR INC	\$2,622.90
WSRA	\$2,612.00
WAL-MART	\$2,528.98
VIKING ELECTRIC - KENOSHA	\$2,201.87
HALLMAN LINDSAY PAINTS	\$2,187.64
WEBCONNEX.COM/CHARGE	\$2,177.05
DA-MILW 100	\$2,105.00
ACT*WASDA	\$1,955.00
EDS ARCHITECTURAL OPENING	\$1,904.00
G2 PRINTING	\$1,800.00
DASH MEDICAL GLOVES	\$1,755.00
234 WISC- MILWAUKEE	\$1,720.70
USPS 56428002632502569	\$1,688.77
PAYPAL *PURPLDOG	\$1,654.75
NATIONALSCI	\$1,654.00
AC RADIO SUPPLY INC	\$1,601.09
ATHLETICS PRO CORP	\$1,564.00
OWW*ORBITZ.COM	\$1,400.52
INSTITUTE FOR EDU	\$1,374.00
3654 INTERSTATE	\$1,345.95
NCTI	\$1,300.00
PBBS EQUIPMENT CORP	\$1,274.07
CROWN TROPHY	\$1,258.80
TESOL CONV REG MEMBER	\$1,220.00



**KUSD Purchasing Card Program - Individual Cardholders**

## Transaction Summary by Merchant

Billing Cycle Ending February 17, 2014

Merchant/Vendor	Total Charge (Credit)
FASTENAL COMPANY01	\$1,115.99
JOHNSTONE SUPPLY	\$1,099.91
AMERICAN TIME & SIGNAL	\$1,084.60
BUREAU OF EDU & RESEARCH	\$1,065.00
MILWAUKEE BREWERS BOX OFF	\$1,063.00
CHESTER ELECTRONIC SUPPLY	\$1,020.51
ULINE *SHIP SUPPLIES	\$1,003.00
KIDWIND INC	\$999.66
QUALIFIEDHARCWARE.COM	\$992.00
BATTERIES PLUS KEN	\$947.90
LEARNING A-Z	\$934.45
SHIFFLER EQUIPMENT SAL	\$889.51
RESOURCES FOR EDUCATORS	\$876.00
SQ *TECH HELP	\$819.98
THUNDERPOWER MEGAPHONE	\$786.87
AMERICAN MGMT ASSOC	\$745.00
LOWES #02560*	\$735.01
COMMITTEE FOR CHILDREN	\$718.00
ALLTECSTORES.COM	\$695.00
STAFF DEVELOPMENT RESOURC	\$687.00
NASSP E-COMMERCE	\$663.00
WI INNOVATIVE SCHOOLS	\$650.00
ASSOC OF WISCONSINI00 OF 00	\$648.00
REI*GREENWOODHEINEMANN	\$636.00
CONNEY SAFETY	\$624.09
STATE OF WI DPI REGONLINE	\$610.00
MHE*MCGRRAW-HILL ECOMM	\$606.04
THE TRANE COMPANY	\$599.72
JONES SCHOOL SUPPL	\$571.20
GREEN SCHOOLS NATIONAL	\$550.00
WALGREENS	\$539.78
QUILL CORPORATION	\$539.61
IVIE ENTERPRISES INC	\$520.85
HMM GREENWOODHEINEMANN	\$518.04
RELECTRIC SUPPLY COMPANY	\$510.11
TOOLUP.COM	\$505.00
ASHMUS BELTING INCORPORAT	\$500.00
USA-CLEAN, INC.	\$489.38
MAYFAIR RENT A CAR KENO	\$479.75
ENVISION	\$475.00
HARBOR FREIGHT TOOLS 142	\$472.29
LAKESHORE LEARNING MATER	\$469.87
UW OSHKOSH DIV OF CONT	\$458.00
WILL ENTERPRISES	\$446.00
ASSOC OF WISCONSIN SCHOOL	\$432.00
CHARGEALL	\$430.74
CENTURY FUEL PRODUCTS	\$419.94
NASRO	\$400.00
FARM & FLEET STURTEVANT	\$396.91
AIRGASS NORTH	\$376.63
COLUMBIA PIPE & SUPPLY	\$369.51

**KUSD Purchasing Card Program - Individual Cardholders****Transaction Summary by Merchant**

Billing Cycle Ending February 17, 2014

Merchant/Vendor	Total Charge (Credit)
ISTE CONFERENCE	\$368.00
BADGER THERMAL UNLIMITED	\$352.82
MCMaster-CARR	\$350.49
WTEA	\$350.00
FOX RENT A CAR PHOENIX	\$347.72
AED SUPERSTORE	\$345.00
ORIENTAL TRADING CO	\$338.19
COLONNA DAUM PRICE	\$328.40
PATS SERVICES INC	\$325.00
RAYMOND GEDDES	\$320.16
ROC*ROCKLER WDWK HDWE	\$317.57
WOODWORKERS HARDWARE - W	\$315.92
PAYPAL *LITERACYEMP	\$312.00
HALOGEN SUPPLY COMPANY	\$308.60
WISCONSIN MATHEMATICS COU	\$300.00
SCHOLASTIC MAGAZINES	\$280.43
ACT*ASSOCIATION OF WIS	\$269.00
NCSM	\$265.00
THE BETTY MILLS COMPANY I	\$261.94
LECTORUM PUBLICATIONS	\$255.24
PAYPAL *TEACHERGAMI	\$252.00
SPENCER AIRCRAFT	\$245.65
SHERWIN WILLIAMS #3180	\$244.52
AMAZON SERVICES-KINDLE	\$244.25
STU*STUMPS	\$239.92
PICK N SAVE	\$233.74
ZORO TOOLS INC	\$229.40
OFFICE MAX	\$228.12
MIDCO 800-536-0238	\$218.12
AT&T*BILL PAYMENT	\$215.83
KENOSHA FRESH MARKE	\$212.64
ERN WEBINARS	\$204.50
ACTE ONLINE	\$204.49
BARNES & NOBLE #2037	\$203.85
STUDICA INC	\$200.00
ASSOC SUPERV AND CURR	\$197.89
TI *CONFERENCE	\$195.00
BARNES&NOBLE*COM	\$194.18
LECTRO COMPONENTS	\$186.40
CC-27 INSULATION PLUS	\$183.30
ENTERPRISE RENT-A-CAR	\$182.81
HOLLAND SUPPLY INC	\$182.10
ACT CONFERENCE REGISTRAT	\$180.00
WI SCHOOL COUNSELORS ASC	\$175.00
HITECH WIRELESS.COM	\$174.70
TRANSIT MEDIA	\$170.00
MONOPRICE INC	\$165.00
CESA #11	\$164.00
GFS MKTPLC #1919	\$163.13
ANIXTER-115687	\$162.02
BLUE COTTON COM	\$159.46

**KUSD Purchasing Card Program - Individual Cardholders****Transaction Summary by Merchant**

Billing Cycle Ending February 17, 2014

<b>Merchant/Vendor</b>	<b>Total Charge (Credit)</b>
BEST BUY 00011916	\$157.95
R-K NEWS INC	\$156.00
FACTORY OUTLET STORE	\$155.90
TAILOR TOYS L.L.C	\$155.87
ALDOLEOPOLDFDN	\$150.00
PAYPAL *AUTISMSOCIE	\$150.00
WUFOO.COM/CHARGE	\$149.75
EXPEDIA*168802744736	\$148.96
STU*SHINDIGZ DECORATIO	\$145.79
UPS	\$140.37
ISTE	\$139.00
SOUTHEASTERN PERFORMAN	\$125.00
HOBBY LOBBY #283	\$119.22
CHILD AND FAMILY CENTERS	\$116.00
KAPLAN EARLY LEARN	\$114.94
SCHRECK ARMY NAVY	\$111.97
EDVOTEK	\$108.95
PETSMART INC 1636	\$104.00
WWW.NEWEGG.COM	\$100.43
LUCKS MUSIC LIBRARY INC	\$100.41
CAMP MACLEAN YMCA	\$100.00
FLOWERS WITH LOVE	\$100.00
NABE	\$100.00
WI ASSN SCHOOL BOARDS	\$100.00
EXPERTS---EXCHANGE.COM	\$99.95
TEACHER'S DISCOVERY	\$99.00
TESOL INTERNATIONAL ASSOC	\$98.00
L & M MEATS	\$94.25
MICHAELS STORES 9192	\$90.25
THE LEARNING SHOP	\$89.72
DICKOW CYZAK TILE CARP	\$89.06
DG HARDWARE	\$86.28
SEARS ROEBUCK 2342	\$83.96
AMERICAN DATABANK.COM	\$81.00
AMAZONPRIME MEMBERSHIP	\$80.56
MOBYMAX	\$79.00
STAGE ACCENTS	\$72.00
SQ *CASLON PUBLISHING	\$70.00
PETCO #618 63506182	\$68.59
ALAMO RENT-A-CAR	\$67.29
TEACHERSPAYTEACHERS	\$65.00
WALMART.COM 8009666546	\$61.50
LA FORCE	\$60.00
SUPER SPORTS FOOTWEAR	\$59.00
VZWRLSS*IVR VN	\$58.01
THE BOOK LOOK	\$56.66
FACTORY CARD OUTLET #174	\$54.35
THREE RIVERS/GROW A FROG	\$52.90
SPECIALIST ID INC.	\$50.80
TCT*ANDERSON'S	\$48.97
FLORAL CREATIONS BY EI	\$48.35

**KUSD Purchasing Card Program - Individual Cardholders****Transaction Summary by Merchant**

Billing Cycle Ending February 17, 2014

<b>Merchant/Vendor</b>	<b>Total Charge (Credit)</b>
PARKSIDE TRUE VALUE	\$48.21
TOWN & COUNTRY GLASS CO	\$40.52
SHOPKO 00200311	\$39.98
EDUCATION WEEK	\$39.00
SECONDARYSOLUTIONS	\$37.95
HESCO INC	\$37.87
MC SPORTS 176	\$37.11
WHOLESALEFOREVERYONE COM	\$36.98
OFFICE DEPOT #1105	\$35.96
ORTHOTAPE.COM	\$33.98
A&B HARDWARE & LOCK SH	\$32.76
ROBERT BROOKE & ASSOCIAT	\$31.65
PIGGLY WIGGLY	\$31.25
WBEA	\$25.00
TARGET 00022517	\$24.00
NNA SERVICES, LLC PHONE	\$20.00
WIS*NATURAL RESOURCES	\$15.97
TENUTAS	\$12.10
HUDSON NEWS OHARE JV	\$11.84
APL*APPLE ITUNES STORE	\$8.89
HOERNEL LOCK & KEY	\$8.40
KENOSHA APPLIANCE PARTS	\$6.50
INT*BRAINSTORM, INC.	\$3.00
WASDA	-\$55.00
NELSON ELECTRIC SUPPLY	-\$600.00
MEETING TOMORROW, INC	-\$1,602.25
<b>US Bank Purchasing Card Payment - Individuals</b>	<b>\$265,418.99</b>

**KUSD Purchasing Card Program - Accounts Payable****Transaction Summary**

Billing Cycle Ending February 17, 2014

Check #	Vendor ID	Vendor Name	Total
99000321	V01124	WIL-KIL PEST CONTROL COMPANY	\$2,400.00
99000363	V01058	FIRST STUDENT	\$85,506.34
<b>US Bank Purchasing Card Payment - Accounts Payable</b>			<b>\$87,906.34</b>

KENOSHA UNIFIED SCHOOL DISTRICT NO. 1  
Kenosha, WI

March 25, 2014

**Administrative Recommendation**

It is recommended that the February 2014 cash receipt deposits totaling \$2,106,638.54 and cash receipt wire transfers-in totaling \$29,257,794.02, be approved.

Check numbers 504327 through 505568 totaling \$7,585,615.16, and general operating wire transfers-out totaling \$ 371,637.47 are recommended for approval as the payments made are within budgeted allocations for the respective programs and projects.

It is recommended that the February 2014 net payroll and benefit EFT batches totaling \$12,523,569.60 and net payroll check batches totaling \$4,854.71 be approved.

Dr. Joseph Mangi  
Interim Superintendent of Schools

Tarik Hamdan  
Interim Chief Financial Officer

Heather Kraeuter, CPA  
Accounting & Payroll Manager

KENOSHA UNIFIED SCHOOL DISTRICT  
Kenosha, Wisconsin

March 25, 2014

**Policy and Rule 5240 – Accommodation of Private School and Home Based  
Educational Program Students**

Policy and Rule 5240 – Accommodation of Private School and Home Based Educational Program Students provides limited enrollment options for Kenosha resident students who are enrolled full time in a private school or home based (homeschool) setting. Act 20 (2013) greatly expanded the opportunities for resident and non-resident homeschooled pupils. Act 20 and the new part-time attendance law (Wis. Stats 118.53) allow homeschooled pupils in any grade to attend any public school on a part-time basis. The previous rule was limited to just resident students in high school grades. A school district is required, space permitting, to allow resident and non-resident homeschooled pupils to take up to two (2) courses per semester at any public school. Pupils must satisfy the minimum standards for admission to a course offered by the school district. The school board of a district shall determine the minimum standards for admission to a course offered by the school district at each grade.

Kenosha resident students who are enrolled full time in a private school are still limited to part time KUSD enrollment at grades 9-12. This option was not changed by the recent legislation. All students participating under the revised rule will be factored into the district membership report for state aid reporting. KUSD Policy and Rule 5240 needs to align with the updated state requirements.

**Administrative Recommendation:**

At the February 11, 2014, joint Personnel/Policy and Curriculum/Program Committee meeting, it was voted to forward revised Policy/Rule 5240 to the full Board for consideration. At its February 25, 2014, meeting the Board approved Policy 5240 as a first reading. Administration recommends that the School Board approve as a second reading proposed revisions to Policy and Rule 5240 – Accommodation of Private School and Home Based Educational Program Students as presented this evening.

Dr. Joseph Mangi  
Interim Superintendent of Schools

Kristopher Keckler  
Executive Director of Information & Accountability

**POLICY 5240**

**ACCOMMODATION OF PRIVATE SCHOOL AND  
HOME BASED EDUCATIONAL PROGRAM STUDENTS**

The District shall accommodate ~~resident~~ parents/guardians who wish to have their children receive education in an alternative setting to a public school, including those participating in private schools or home-based private educational programs.

**LEGAL REF.: Wisconsin Statutes**

Sections	115.001(3g)	Home-based private educational program definition
	115.001(3r)	Private school definition
	115.001(3r)	Private school definition
	118.145(3)	Private school and home-based student enrollment in high school courses
	118.15(4)	Home based private educational program as alternative to public or private school enrollment
	118.53	Attendance by pupils enrolled in a home-based private educational program
	120.13	Broad board power to do all things reasonable to promote education of students
	121.004(2)	Inclusion of private and home-based educational program students in membership report for state aid purposes
	121.004(7)(em)	Inclusion of pupils attending school outside or in his or her district shall be counted accordingly

**CROSS REF.:** 5200 School Admissions

**AFFIRMED:** December 28, 1990

**REVISED:** January 27, 1998



RULE 5240

ACCOMMODATING PRIVATE SCHOOL AND  
HOME BASED EDUCATIONAL PROGRAM STUDENTS

To accommodate private school and home based educational program students, the District shall:

1. Provide assistance and information to parents/guardians who seek information on alternative educational programs, including private schools and home-based educational programs.
2. Allow a student enrolled in a private school or home based educational program to enroll in not more than two courses during the school ~~year~~ **semester** in a District school provided the following conditions are met:

**Private School Student:**

1. the **private school** student is eligible for high school admission, and
2. the **private school** student resides in the Kenosha Unified School District, and
3. **the private school pupil meets the minimum standards for each course, and**
4. there is sufficient space in the classroom.

**Home based/Homeschool Student:**

1. **the resident/non-resident homeschool student is eligible for admission at any grade, and**
  2. **the resident/non-resident homeschool student meets the minimum standards for each course, and**
  3. **there is sufficient space in the classroom.**
3. Accommodate other requests from students enrolled in a private school or home-based educational program to enroll in a class or co-curricular activity in the District where space is available and the District would not incur any additional cost due to such accommodation. The rules of the Wisconsin Interscholastic Athletic Association (WIAA) and other co-curricular activity regulatory entities will be followed where applicable when making decisions regarding student enrollment in a co-curricular activity.
  4. Determine grade and/or class placement for students who transfer into a District school from a private school or home-based educational program primarily based on the student's mastery of the District's subject matter content standards. The school principal/designee shall evaluate the student's records to determine the amount of credit that will be granted for the alternative education experience. Evaluative criteria may include but is not limited to: grade transcripts, progress reports, portfolios of completed work, curriculum reviews, recommendations and assessments administered by the receiving school.

*This page intentionally left blank*

**Kenosha Unified School District  
Kenosha, Wisconsin**

**March 25, 2014**

**POLICY 6520 – FIELD/CO-CURRICULAR TRIPS**

**Background**

Kenosha Unified School District lies in a unique location with many wonderful learning opportunities for students within the city limits as well as outside of the city and state limits. The Board of Education requested that the Department of Teaching and Learning review current School Board Policy 6520 - Field/Co-Curricular Trips to ensure it meets the needs of staff and students when considering an extended learning opportunity off school grounds. The request also included a close examination of Kenosha Public Museums in regards to their alignment with Kenosha Unified's curriculum and standards.

Kenosha Unified School District's School Board Policy 6520 highlights the importance of providing extensions within the learning environment to enhance student learning. The following link (<http://www.kusd.edu/docs/EducProgServ.pdf>) provides a closer examination of the current educational programs and services provided by the Kenosha Public Museums.

**Evaluation**

Upon review, the current policy as written is properly worded in order for district staff to adequately address field trips and offer extending and enriching off campus learning opportunities for all students. Upon further review, the educational programs and services being offered by the Kenosha Public Museums meet Kenosha Unified standards and curriculum.

**Recommendation**

At the February 11, 2014 Joint Personnel/Policy & Curriculum/Program Standing Committee meeting, Administration recommended that wording in current Board Policy 6520 be retained and to encourage the many wonderful learning opportunities inside the city limits as well as outside the city and state limits for student growth and learning. Kenosha Public Museums would be an enriching and engaging opportunity for students as the current educational programs and services offered via the museums are aligned to current grade (kindergarten through eighth) standards and curriculum. The joint committee voted to forward Policy 6520 to the full Board for consideration of a minor word change in paragraph two. At its February 25, 2014, meeting, the School Board approved revised Policy 6520 as a first reading.

Administration recommends that the Board approve revised Policy 6520 – Field/Co-Curricular Trips as a second reading this evening.

Dr. Joseph Mangi  
Interim Superintendent of Schools

Dr. Sue Savaglio-Jarvis  
Assistant Superintendent of Teaching and Learning

POLICY 6520  
FIELD/CO-CURRICULAR TRIPS

A field/co-curricular trip is an extension of the classroom/co-curricular experience. Trips should be considered an expansion or enrichment of the regular curriculum. One day trips within Wisconsin that are related to specific curricular or co-curricular objectives and provide educational enrichment for participating students must be approved by the building principal. Overnight and out of state trips must be approved by the Assistant Superintendent/designee. To be educationally beneficial, a field trip/co-curricular trip requires thoughtful selection, careful advance preparation of the class/activity group, and a plan to assist students in assimilating the experience during and after the conclusion of the trip.

As it pertains to International Educational Tours, the Superintendent of Schools/designee ~~will~~ **must** give written approval to a teacher to take District students on an international educational tour. No District resources, including personnel, will be committed to an international educational tour that has not been approved.

All district rules and student handbook policies are in force and need to be adhered to while on co-curricular trips.

LEGAL REF.: Wisconsin Statutes

- Sections 118.13 [Student discrimination prohibited]
- 120.13 [Board power to do all things reasonable for the cause of education]
- 121.54(7) [Extracurricular transportation]

CROSS REF.: 3280, Student Fees

- 3340, Monies in School Buildings
- 3511, Transportation
- 3514, Use of Privately Owned Vehicles to Transport Students
- ~~3545.4, Non Public School Students~~
- ~~3545.6, Student Transportation Services~~
- 5110, Equal Educational Opportunity/Discrimination Complaint
- ~~5126.3, Management of Funds~~
- 5132, Motor Vehicles Use
- 5430, Student Conduct and Discipline
- 5531, Emergency Care ~~Services~~
- 5534, Medication
- 6700, Extracurricular Activities and Programs
- 6730, Social Events/Student Reward Trips
- Classroom Code of Conduct*
- Teaching and Learning Practices and Forms

ADMINISTRATIVE REGULATIONS: ~~5531, Guidelines for Building Emergency Plans~~

AFFIRMED:

REVISED: September 14, 1999  
January 29, 2002  
December 14, 2004  
July 24, 2012

Kenosha Unified School District  
Kenosha, Wisconsin

March 25, 2014

**School Board Policy 8720 – Special School Board Meetings  
Second Reading**

Mr. Flood's Rationale: Bob Nuzzo and myself tried this at a board meeting and were told that it was against policy. This will increase communication, transparency and accountability for the Board.

At the January 25, 2014, regular board meeting, it was unanimously approved to table revisions to Policy 8720 until the February 25, 2014, meeting.

At the February 25, 2014, regular board meeting, it was voted to approve revised Policy 8720 as a first reading with the addition of "with the exception to any contradiction to any policy" added at the end of the fourth paragraph. The revised policy is brought forward for a second reading this evening.

Kyle Flood  
School Board Clerk

POLICY 8720  
SPECIAL SCHOOL BOARD MEETINGS

Special meetings of the School Board shall be held upon written request of any School Board member. The request shall be filed with the School Board Clerk, or in his/her absence, the School Board President. Special meetings shall be scheduled to take place on School District property, except meetings held jointly with other school boards.

Each School Board member shall be notified in writing of the time and place of a special School Board meeting at least 24 hours before such meeting, except as otherwise specifically provided by law. Notice shall be delivered to Board members personally or at their place of abode, or by mail.

Advanced public notice shall be given for all special Board meetings in accordance with state law and School Board policy.

**Public comments will be held at all Special Board meetings, however, comments will only be allowed if they address the items on the Special Meeting agenda. Comments will follow the same standards set at Regular Board meetings with the exception to any contradiction to any policy.**

Business transacted at special Board meetings shall be confined to the purpose(s) for which it was called. The order of business shall be consistent with that of a regular meeting. A majority of School Board members may determine the adjournment time of a special meeting in advance of or at the start of the meeting, which time may not be changed except by two-thirds vote of those School Board members present at the meeting.

LEGAL REF.: Wisconsin Statutes  
                    Sections 19.84           [Public notification requirements]  
                                  19.85           [Open meeting exemptions]  
                                  120.11(2)   [Special board meetings]

CROSS REF.: 8710, Regular Board Meetings  
                  8711, Public Notification of Board Meetings  
                  8712, Agenda Preparation and Dissemination  
                  8730, Executive Session (Closed Sessions)  
                  8810, Rules of Order  
                  8820, Quorum  
                  8840, Board Minutes  
                  8870, Public Participation at Board Meetings

ADMINISTRATIVE REGULATIONS: None

AFFIRMED: June 8, 1993

REVISED: November 11, 1999  
              March 28, 2000  
              July 10, 2001

KENOSHA UNIFIED SCHOOL DISTRICT  
Kenosha, Wisconsin

March 25, 2014

**MARY FROST ASHLEY CHARITABLE TRUST**

The District applied and received funding from the Mary Frost Ashley Charitable Trust in 2010 and 2011 for the Back-to-School – A Celebration of Family and Community Event, and parent and student programs. In 2012 the District was invited to apply and received funding from the Trust for Back to School supplies that were distributed at Elementary School Open Houses, parent and student education and learning experiences, parent leadership training, and support for the District's Recognition Program, Academic Showcase, annual Alcohol, Tobacco, and Other Drugs Awareness Student Recognition Brunch and playground equipment.

During the 2014-2015 school year, the District plans to further develop and strengthen the comprehensive parent education training program, family interactive learning experiences, and expand student learning opportunities through support with a high school group, strengthen the District's Recognition Program, further develop the annual Alcohol Tobacco, and Other Drugs Awareness Student Recognition Brunch and Awareness week, and provide safe playground equipment for the elementary school with the oldest equipment. This comprehensive program is developed with the framework of Search Institute's "40 Developmental Assets," Joyce Epstein's School, Family and Community Partnerships guide, and the District's Transformation Design. The design plan includes improving student achievement, personalized learning, expanding collaborative partnerships with families, the community and industry as well as implementing Joyce Epstein's "Ten Steps to Success: School-Based Programs of Family, School, and Community Partnerships" and securing resources to support student learning.

Data will be kept on attendance, ethnicity, and student participation in interactive family programs and student engagement. There will be two methods for evaluation; 1) written evaluations by the participants, and 2) informal discussions with participants. A summary will be compiled by the presenter. The application includes the following major components:

- 1) Provide school supplies for elementary age children
- 2) Implement interactive family learning experiences that relate to curriculum, strengthening family and school connections, and safety issues.
- 3) Deliver parent education trainings that focus on parenting skills development, particularly in the area of behavioral management, and support to families that are experiencing challenges with lack of education, employment, and resources.
- 4) Continue to establish and train Action Teams for Partnerships in eight schools. The teams will access past practices, and identify current issues and strengths with family engagement and community collaboration. From there, the team will develop an action plan to expand and strengthen family engagement and community partnerships.

- 5) Initiate and support plans with Partnership Teams at Wilson with a lending library, Brass with the challenge of strengthening involvement with “Dads,” EBSOLA Dual Language with Computer Classes for parents in English and Spanish, and Reuther with their engagement strategies to involve additional parents with the child’s education.
- 6) Support student engagement learning opportunities that will assist students in developing healthy life skills, engaging in community service, and experience learning opportunities through book studies.
- 7) Support the annual Alcohol, Tobacco, and Other Drugs Awareness Student Recognition Brunch and week-long education sessions.
- 8) Strengthen the District Recognition Program, a program that recognizes 25 years of service, a Recognition Dinner for individuals receiving recognition for exemplary service within and external partners and a retirement reception.
- 9) Provide safe playground equipment at McKinley Elementary School. This school has the oldest equipment. It is also a school with 84.39% poverty.

The all-encompassing program will continue to build on the framework of Joyce Epstein’s research from John Hopkins University. The framework includes the Six Types of Family-School-Community Partnerships; Parenting, Communication, Learning at Home, Volunteering, Decision Making, and Community Collaboration. Within that research (Epstein & Sheldon 2006), Epstein indicates, “School, Family and Community Partnerships is a better term than parental involvement. The concept of “partnership” recognizes that parents, educators, and others in the community share responsibility for students’ learning and development.” This model provides significant support to moving the District’s Transformational Design Goal #2 forward.

### **Title**

A Framework for Healthy Youth Development: Expanding Family and Student Learning Programs.

### **Funding Source**

These funds originate from the Mary Frost Ashley Charitable Trust. The Trust was created by Mary Frost Ashley to provide financial support to the charitable organizations in Kenosha, Wisconsin. The Kenosha Unified School District was invited to submit a 2014 proposal to the Trust.

### **Time Period**

July 1, 2014 – June 30, 2015

### **Purpose**

The goal is to further develop the District’s Family Engagement Training and Education Programs as well as provide meaningful and engaging learning opportunities for students to increase achievement and attendance. The following goals support the expansion of family and student participation as well as a stronger home school connection:



Goal I	Coordinate back to school supplies for elementary children to ensure equity and preparation for learning.
Goal II	Plan and deliver programs that are interactive family learning opportunities such as the Math Fair, Science Interactive Night, Dr. Seuss, Internet Safety, Family Health and Fitness and family awareness activities that strengthen family communication.
Goal III	Further develop parent education trainings that support parent skills development, strengthening family communication, violence prevention, literacy in support with reading to your child, and life skills that support the development of the “40 Developmental Assets.”
Goal IV	Develop and train Action Teams for Partnerships in eight schools that will establish a yearlong plan to strengthen family engagement and community partnerships.
Goal V	Initiate newly developed plans with Partnership Teams in their second year of implementation such as Wilson with the lending library and ESL classes, Brass with the challenge of strengthening “Dads” with their child’s education, EBSOLA Dual Language with Computer Classes for parents in English and Spanish, and Reuther with their engagement strategies to involve additional parents with their child’s education.
Goal VI	Fully develop student engagement at two secondary schools that includes a community service learning project between secondary schools and an elementary school.
Goal VII	Provide support for the Annual Kenosha County Alcohol, Tobacco, and Other Drugs Awareness Student Recognition Brunch and week-long education sessions.
Goal VIII	Assist with strengthening District's Recognition Program.
Goal IX	Plan and support safe playground equipment for McKinley Elementary School which has the oldest equipment in the district.

The goals included in this plan directly relate to Transformation Plan Goal #2.

**Number of students served:** 22,676

### **Relationship to Transformation Design**

This proposal directly relates to the District’s Transformation Plan mission, goals, and student results. The transformation goal, as it relates to the A Framework for Healthy Youth Development: Expanding Family Learning and Student Engagement Programs, is to expand collaborative partnerships with families, community, and industry.

### **Budget**

<b>Classification</b>	<b>Object</b>	<b>Amount</b>
Support Services	Salaries	\$19,805.25
	Fringes	\$2,763.48
	Purchased Services	\$39,485.00
	Non-Capitol Objects	\$27,946.27
	Equipment	\$20,000.00
	<b>Total</b>	<b>\$110,000.00</b>

## **District Resources Committed as a Result of the Acceptance of these Funds**

The Community School Relations Coordinator is required to coordinate all goals in the program. Support for Parent Site Organizers, child care, and additional time for staff is covered through the Community School Relations Office Budget for approximately \$15,000.00.

## **Relationship to District Budget**

The trust covers items above those offered in the District budget.

## **Evaluation Plan**

Elementary principals will receive, complete and return an evaluation form as to the effectiveness of the Back to School supplies distributed to the students in their buildings. The data will be compiled and reviewed for future planning.

The eight schools that participate in the Joyce Epstein's School, Family and Community Partnerships process to strengthen family engagement and community participation will complete an evaluation through focus groups. Each school will have an outside facilitator lead a group discussion on the value of this process to determine if it has an effective impact on the school-community.

The Action Teams for Partnership will review their first year's plan and further develop the programs established within their school sites. Evaluations will be reviewed and adjustments made if necessary for program effectiveness.

The Family interactive learning experiences and parent skill development trainings will have a formal written evaluation which includes a written narrative on how parents will use the strategies gained through a program to enhance learning at home and improve home-school communication connections. The programs will also have informal group reviews to determine the effectiveness of the program. This data will be reviewed by the principals and presenters.

Every program will collect attendance data that includes how many parents and students attend and participate in the interactive program, ethnicity, and attendance in pre-school child care during the program. Data from a written form regarding the climate of the location and value of the program will be compiled annually.

Best practice, research based and evidence based programs will follow the evaluation criteria set up for the program. Examples will include Second Step, 911 for Parents, Families and School Together (FASTWORKS), Supporting School Success, Parents as Teachers, Successful Fathering, and Motherread Fatherread. Parents participating in Successful Fathering and Motherread Fatherread will participate in a focus group when the series is completed. Information compiled will help set the direction of the program for future groups.

The Bradford Leading Ladies group will engage in a focus group with students and an outside facilitator to assist in determining the effectiveness of the program. Other students in the school will voluntarily complete a survey to also determine the value of the established group.

The student groups providing the community service project as well as Jefferson families that participate in the community service project will have an end of the year evaluation to determine the effectiveness of the program.

The Annual Kenosha County Alcohol, Tobacco, and the Other Drugs Awareness Student Recognition Committee will send out evaluations to school site representatives, parents, teachers, and the committee at large. Input from the evaluations will be used to consider revisions in the year long program for the 2015-2016 school year.

The District's Recognition Program will collect data and review the results to determine the effectiveness of the new collaborative group awards.

### **Type of Project**

This is a competitive application.

### **Staff Persons involved in preparation of application**

Tanya Ruder, Executive Director of Community Partnerships and Media Relations  
Patricia Demos, Community School Relations Coordinator  
Juan Torres, Even Start Program Director/Community Liaison  
Teri Giampietro, McKinley Elementary School Principal  
Scott Kennow, Brass Community School Principal  
Yolanda Jackson Lewis, Wilson Elementary School Principal  
Cheryl Johnson, Bradford High School Teacher

### **Administrative Recommendation:**

At the March 11, 2014, joint Audit/Budget/Finance and Curriculum/Program Standing Committee meeting, it was voted to forward this grant to the School Board for consideration. Administration recommends that the School Board approve this one-year grant proposal titled Framework for Healthy Youth Development: Expanding Family Learning and Student Engagement Program in the amount of \$110,000 for submission to the Mary Frost Ashley Charitable Trust.

Dr. Joseph Mangi  
Interim Superintendent of Schools

Tanya Ruder  
Executive Director of Community Partnerships and Media Relations

Patricia Demos  
Community School Relations Coordinator

## Fiscal, Facilities and Personnel Impact Statement

<b>Title:</b>	A Framework for Healthy Youth Development: Expanding Family and Student Learning Programs	<b>Budget Year:</b>	2014-2015
<b>Department:</b>	Office of Communications	<b>Budget Manager:</b>	Patricia Demos

### REQUEST

School Board approval is requested to submit and implement a one-year grant to further develop and strengthen the comprehensive parent education training program, family interactive learning experiences, and expand student engagement learning opportunities through a high school group that provides a framework for character building and healthy learning experiences. This comprehensive program is developed with the framework of Search Institute's "40 Developmental Assets," Joyce Epstein's School, Family and Community Partnerships guide, and the District's Transformation Plan. The plan includes improving student achievement, expanding collaborative partnerships with families, the community and industry as well as implementing Joyce Epstein's "Ten Steps to Success: School-Based Programs of Family, School, and Community Partnerships" and securing resources to support student learning, comprehensive interactive family and student learning program opportunities to increase student attendance, achievement, and participation in citizenship. The grant includes support for the District Recognition Program and the ATOD Awareness Program. The grant request is for \$110,000 which includes funds to support Back to School supplies for the 2014-2015 Elementary School Open Houses.

Insert narrative summarizing the nature of your request

### RATIONALE/ INSTRUCTIONAL FOCUS

The Grant will provide funding to further develop family learning opportunities, parenting skills development, family interactive learning programs, sessions on understanding the new "Family" structure at the elementary schools, implementing the Joyce Epstein's Partnership model process, student group learning opportunities and a community service project. The goals include:

- Goal I Coordinate back to school supplies for elementary children to ensure equity and preparation for learning.
- Goal II Plan and deliver programs that are interactive family learning opportunities such as the Math Fair, Science Interactive Night, Dr. Seuss, Internet Safety, Family Health and Fitness and family awareness activities that strengthen family communication.
- Goal III Further develop parent education trainings that support parent skills development, strengthening family communication, violence prevention, literacy in support with reading to your child, and life skills that support the development of the "40 Developmental Assets."

- Goal IV Develop and train Action Teams for Partnerships in eight schools that will establish a yearlong plan to strengthen family engagement and community partnerships.
- Goal V Initiate newly developed plans with Partnership Teams in their second year of implementation such as Wilson with the lending library and ESL Classes, Brass with the challenge of strengthening “Dads” with their child’s education, EBSOLA Dual Language with Computer Classes for parents in English and Spanish, and Reuther with their engagement strategies to involve additional parents with their child’s education.
- Goal VI Fully develop student engagement at two secondary schools that includes a community service learning project between secondary schools and an elementary school.
- Goal VII Provide support for the Annual Kenosha County Alcohol, Tobacco, and Other Drugs Awareness Student Recognition Brunch and week-long education sessions.
- Goal VIII Assist with strengthening District's Recognition Program.
- Goal IX Plan and support safe playground equipment for McKinley Elementary School which has the oldest equipment in the district.

The goals included in this plan directly relate to Transformation Plan Goal #2.

### IMPACT

This program provides opportunities for families to strengthen their involvement in their child's education, increase their parenting strategies and current information on pertinent issues such as technology safety, strengthen parenting strategies, and increase student learning opportunities that directly relate to life skills development and participation in citizenship.

### BUDGET IMPACT

Object Level	Descriptive	Amount
100's	Salaries	\$19,805.25
200's	Fringes	\$2,763.48
300's	Purchased Services	\$39,485.00
400's	Non-Capital Objects	\$27,946.27
500's	Capital Objects	\$20,000.00
		\$0.00
	<b>TOTAL</b>	<b>\$110,000.00</b>

This is a ☒ one-time or a ☐ recurring expenditure

### FUNDING SOURCES

Select Funding Sources: Additional Source of Revenue Available

*This page intentionally left blank*

Kenosha Unified School District  
Kenosha, Wisconsin

March 25, 2014

**READ TO LEAD GRANT REQUEST**

Approval from the Board of Education is requested to submit and implement the Read to Lead Development Fund Grant. The maximum funding possible for this grant is \$50,000.00. The grant is aimed at improving literacy and early childhood development.

- **Grant Title**
  - Read to Lead Development Fund Grant
- **Funding Source**
  - Wisconsin Department of Public Instruction
  - Read to Lead Development Council
- **Grant Time Period**
  - July 1, 2014 to June 30, 2015

**Purpose:**

The purpose of this grant is to support literacy development of KUSD Early Education students and their families at one elementary location. This would be accomplished through the use of electronic readers coupled with literacy training for Early Education staff and for the parents in those classrooms.

**Proposal:**

Similar to the current Early Education “Take Home Book” program, families in the selected classrooms will be invited to take home an electronic reader (e-reader). The e-reader will be pre-loaded with age appropriate as well as challenging literature. The E-books purchased for the e-reader will allow books to be read in either Spanish or English, depending upon the language spoken within the home. Challenging literature will be included as books downloaded on the e-reader to promote the development of increasingly complex vocabulary. The KUSD Library Media Consultant and Early Education Instructional Coaches will collaborate to determine which E-books are purchased for the e-readers.

Prior to taking an e-reader to their home, parents will be required to participate in training on the features of the e-reader, the care of the e-reader, and the liability assumed by the family when an e-reader is brought to their home. Parents will also need to commit to attending literacy training for parents. Literacy training for parents will focus on how to use stories on the e-reader to promote phonological awareness, alphabet knowledge, knowledge of print, and comprehension. Parents will be able to

use these foundational literacy skills to support their child's reading through the primary grades.

Early Education staff will be required to attend these trainings with the parent. Building a positive relationship with parents is a foundational belief of the Early Education program. Staff participation in these trainings provides an additional opportunity for the teachers and parents to strengthen their relationship while learning more about how to support the child that they share.

Early Education staff will also be expected to incorporate literacy skills and e-readers into all school wide or classroom family events. Professional development on the application of the connection of vocabulary to future reading success will be provided to the Early Education staff at this site.

**Relationship to District Plan and Goals:**

The plan for implementing the Read to Lead Development Fund Grant correlates to the District's Transformation Plan and following goals:

- Improve student achievement.
- Expand collaborative partnerships with families, community, and industry.
- Secure resources to support learning.

Establishing a foundation for literacy increases the likelihood that a student will be a "reader". The activities identified in this grant proposal will be monitored throughout the 2014-15 school year, with success evaluated at the conclusion of the school year. Based on the assessment results revisions to the plan will occur and consideration will be given to expansion of the concept to other Early Education sites.

**Administrative Recommendation:**

At the March 11, 2014, joint Audit/Budget/Finance and Curriculum/Program Standing Committee meeting, it was voted to forward this grant to the School Board for consideration. Administration recommends that the School Board approve the Read to Lead Development Fund Grant as presented.

Dr. Joseph Mangi  
Interim Superintendent of Schools

Dr. Floyd Williams, Jr.  
Assistant Superintendent of Elementary  
School Leadership

Ms. Belinda Grantham  
Director of Pre-school





## BUDGET ASSUMPTION SUMMARY - EXPENDITURE

**Title:** Read to Lead Development Fund Grant

**Budget Year:** 2014 - 2015

**Department:** Early Education

**Budget Manager:** Belinda Grantham

### REQUEST

Requesting to submit and implement the Read to Lead Development Fund Grant. The maximum funding possible for this grant is \$50,000.00. The grant is aimed at improving literacy and early childhood development.

Grant funds will be used to:

- Purchase 1000 E-books at \$20.00 per book
- Purchase 100 Electronic readers at approximately \$250.00 per tablet.
- Develop and provide literacy trainings for parents and staff.

### RATIONALE/ INSTRUCTIONAL FOCUS

The program will:

- Enhance the literacy component of the Early Education program.
- Put books into the hands of low-income children.
- Increase the number of Spanish and English fiction and non-fiction books available to children in their home.
- Engage parents in reading to their children or listening to a story with their children in the language spoken in the home.
- Provide books of differing reading levels so that children are exposed to increasingly challenging vocabulary.
- Engage parents in learning/teaching foundational literacy skills to their children (phonological awareness, alphabet knowledge, knowledge of print, and comprehension).
- Collaborations with community agencies will be established so that additional reading, writing, and computer literacy skills may be sought by parents wanting to improve their own literacy skills.
- Collaborations with businesses will be established to help expand a successful program.

### IMPACT

- Establishing a foundation for literacy increases the likelihood that a student will be a “reader”.
- The activities identified in this grant proposal will be monitored throughout the 2014-15 school year with success evaluated at the conclusion of the school year.
- Based on the assessment results revisions to the plan will occur and consideration will be given to expansion of the concept to other Early Education sites.

### BUDGET ASSUMPTION

Object Level	Descriptive	Amount
100's	Salaries	\$1300.00
200's	Fringes	\$ 400.00
300's	Purchased Services	\$ 0
400's	Non-Capital Objects	\$ 45,000.00
500's	Capital Objects	\$0
<b>TOTAL *</b>		<b>\$45,000.00</b>

**\*To re-calculate the Total Amount, click once in the Total Amount cell then press the F9 key.**

Is this a ☒ One-time or ☐ Recurring expenditure?

### FUNDING SOURCES

Enter Funding Sources *(Additional revenues, re-allocation of existing budgeted funds, donations and/or request for new funds)*

Monies identified above would come from the grant funding.

**Kenosha Unified School District  
Kenosha, Wisconsin**

**March 25, 2014**

**HEAD START FEDERAL GRANT AND COST-OF-LIVING  
ADJUSTMENT REQUEST**

At the March 11, 2014, joint Audit/Budget/Finance and Curriculum/Program Standing Committee meeting, there was agreement to forward the Head Start Federal Grant Request to the School Board for consideration. Since that time the Kenosha Unified School District Head Start Program has received notification of:

- An increase of \$105,349 in the base award amount to restore the reduction in funds created through sequestration.
- A Supplemental Federal Head Start Cost-of-Living Adjustment Grant award of \$25,987.

Application for the base award amount of \$1,999,031 is due April 1, 2014. Application for the separate Cost-of-Living Adjustment (COLA) Grant is due April 25, 2014.

Approval from the Board of Education is requested:

- To submit and implement the Head Start Federal Grant for the 2014-2015 school year. The funding for this grant is \$1,999,031. The grant is designed to fund the operating costs of the Kenosha Unified School District Head Start Program.
- To submit and implement the Supplemental Head Start Federal Cost-of-Living Adjustment (COLA) Grant for the 2014-15 school year. The funding of this grant is \$25,987. As stated in the program instruction memorandum, COLA funds are to be used to increase staff salaries and fringe benefits to pay for higher operating costs. KUSD Head Start will use these monies to off-set the cost of employee salaries and benefits for the 2014-15 school year.

**Grant Titles**

- Head Start Federal Grant Award
- Supplemental Head Start Federal Cost-of-Living Adjustment Grant

**Funding Source**

U.S. Department of Health and Human Services  
Administration for Children and Families

**Grant Time Period**

July 1, 2014 to June 30, 2015

**Purpose**

The purpose of the Head Start program is to provide comprehensive services in the areas of health, education, social/emotional development, and parent involvement for low-income preschool children and their families. This grant will service 330 high-risk children who will be three or four years of age on or before September 1, 2014. Funds will be utilized to serve the children and their families in all program component areas as required in the Head Start Act and through the Head Start Performance Standards.

## **Number of Students Served**

330 eligible Head Start Students

## **Relationship to District Plan and Goals**

The Head Start approach to school readiness ensures that families have the skills and knowledge necessary to support development and learning in children. This correlates to the district's Transformation Plan and following goals:

- Improve student achievement.
- Expand collaborative partnerships with families, community, and industry.
- Secure resources to support learning.

The Head Start Approach to School Readiness means that children are ready for school, families are ready to support their children's learning, and the transition into kindergarten is effective. Readiness goals are defined as the expectations at children's developmental levels and progress across domains of language, literacy, cognition/general knowledge, approaches to learning, physical health, well-being, motor and social/emotional development. Success in these areas will support each child's readiness for kindergarten.

## **Fiscal Impact**

See attached Fiscal Impact statements.

## **Program Services**

All Head Start staff is employed through the Kenosha Unified School District and follow the contract agreements for their work classification. The monies that are provided in the Supplemental Cost-of-Living Grant will be dedicated toward the any salary increases that may be required, and/or increases in health/dental benefit costs.

Head Start is proposing the following changes to the program for the 2014-2015 school year:

- A reduction in the number of sites that provide Head Start services.
  - Due to a drop in the birth rate in the Head Start service area, Head Start would need to add sites in order to meet the mandated enrollment number. The program is not able to provide the staffing levels that would be needed to support additional sites. For this reason, we are reducing the number of Head Start sites by four.
  - Head Start will provide services at Bose, Brass, Chavez Learning Station, EBSOLA, Frank, Jefferson, McKinley, and Wilson Elementary Schools.
- An increase in the number of classrooms at some of the sites that they currently serve.
  - To ensure that Head Start consistently meets their mandated enrollment number the program will focus on increasing the percentage of children that they currently serve at the sites identified above. At some locations this will result in an expansion of the number of classrooms that currently provide Head Start services.

- To comply with Head Start Performance Standards, each classroom that provides Head Start services will be staffed with a teacher and an educational support person.
- Collaboration with KUSD Early Education to pilot CLASS (Classroom Assessment Scoring System) in some classrooms.
  - CLASS is a program evaluation tool that Early Education is working to pilot in some classrooms next year.
  - CLASS measures the environment and student-teacher interaction in a pre-K classroom. This tool is used by the Federal Review Teams that conduct the Head Start Federal Reviews.

In addition to the program changes identified above, the following revisions to staffing will be included in the grant:

- 1.0 FTE Instructional Coach
  - Included in this Instructional Coach position will be the responsibilities of the Head Start Disability Coordinator. The Head Start Disability Coordinator responsibilities were divided and absorbed by other positions when the previous Disability Coordinator became the interim principal of the Chavez Learning Station. The responsibilities of the Head Start Disability Coordinator have proven to be too involved to be added to other positions. For this reason Head Start is electing to re-establish the role.
- 1.0 FTE Family Engagement Specialist/0.5 FTE Family Service Provider Coach
  - A National Head Start initiative is to build relationships with families that support family well-being, strong parent-child relationships and ongoing learning and development of parents and children alike. The Family Engagement Specialist/Family Service Provider coach will support this initiative.

These three positions will strengthen and enhance the Head Start Program. The Instructional Coach will be able to support staff ensuring that Head Start children receive the very best education. The Family Engagement Specialist/Family Service Provider coach will support parents and Family Service Providers guiding them toward increased engagement in their child's education at home, school and in the community.

The salaries and benefits for these positions will be attributed to this Head Start grant.

## **Evaluation Plan**

- The Head Start program meets a community need for the services that it provides. This will be evident through the maintenance of a Head Start waiting list of families that qualify for the program.
- Student outcomes are monitored within the Head Start Child Development and Early Learning Framework in eight developmental domains. The progress of every child is reported to

parents/guardians three times during the school year. The outcomes measured are aligned with Wisconsin Model Early Learning Standards and Common Core Standards.

- Semi-annual Program Report to the Policy Council and School Board Semi-annual reports to monitor the program.
- Program Plan Report to the Head Start Region V office in Chicago.
- Head Start monthly reports (HS 22) to the Policy Council and School Board.
- Quarterly calls to the Head Start Region V office in Chicago.
- The Head Start program conducts an annual self-assessment in January to determine strengths and areas that are in need of improvement.
- An annual report is available to the community and all stakeholders providing statistics, services and budget information.

**Staff Persons involved in preparation of the grant application:**

Belinda Grantham, Director of Pre-school

Lisa KC, Assistant Head Start Director, Chavez Learning Station

Lynda Dower, Family & Community Coordinator

Samantha McGovern, Education and Disabilities Coordinator

Debbie Moran, Policy Council President

Kristin Klimisch, RN, Health Coordinator

**Administrative Recommendation**

Administration recommends that the School Board approve the Head Start Federal Grant Request as revised in the amount of \$1,999,031.

Administration additionally recommends that the School Board approve the Supplemental Federal Head Start Cost-of-Living Adjustment Grant award of \$25,987.

Dr. Joseph Mangi  
Interim Superintendent of Schools

Dr. Floyd Williams  
Assistant Superintendent of Elementary  
School Leadership

Ms. Belinda Grantham  
Director of Pre-school

Ms. Lisa KC  
Assistant Director Head Start

## Fiscal, Facilities and Personnel Impact Statement

**Title:** Head Start Federal Grant Request

**Budget Year:** 2014-2015

**Department:** Early Education

**Budget Manager:** Belinda Grantham

### REQUEST

Approval from the Board of Education is requested to submit and implement the Head Start Federal Grant for the 2014-2015 school year. It is designed to fund the program's operations with \$1,893,682.

### RATIONALE/ INSTRUCTIONAL FOCUS

This grant serves the academic, social/emotional, and health needs of low-income three and four year old children and their families. Children who qualify must reside within the boundaries of KUSD. The Head Start approach provides the foundation for implementing systemic and integrated comprehensive child development services and family engagement efforts that lead to school readiness for young children and families. This supports stronger attendance rates, academic performance, and higher graduation rates in later years.

### IMPACT

This Head Start grant provides:

- Funding for staffing (teachers and educational assistants) to serve 330 children within the guidelines of the Head Start Performance Standards.
- Funding for support staff (family service providers, coordinators, director) for families of Head Start children as specified in the Head Start Performance Standards.
- Utilities and maintenance of the Chavez Learning Station
- Purchased services and supplies to support Head Start Performance Standards.
- All Head Start staff are employed through the Kenosha Unified School District and follow the contract agreements for their work classification.

### BUDGET IMPACT

Object Level	Descriptive	Amount
100's	Salaries	\$1,013,379
200's	Fringes	678,964
300's	Purchased Services	148,369
400's	Non-Capital Objects	158,319
500's	Capital Objects	0

		\$0.00
	<b>TOTAL</b>	<b>\$1,999,031.00</b>

This is a ☐ one-time or a ☒ recurring expenditure

### FUNDING SOURCES

Select Funding Sources:

Head Start Federal Grant will provide funds.



## Fiscal, Facilities and Personnel Impact Statement

**Title:** Supplemental Head Start Cost-of-Living Adjustment Grant

**Budget Year:** 2014-15

**Department:** Early Education

**Budget Manager:** Belinda Grantham

### REQUEST

Approval from the Board of Education is requested to submit and implement the Supplemental Head Start Federal Grant - Cost of Living Adjustment for the 2014-15 school year. The funding for this grant is \$25,987. It is designed to fund cost of living adjustments to the salaries of Head Start employees.

### RATIONALE/ INSTRUCTIONAL FOCUS

This grant serves the academic social/emotional and health needs of low-income three and four year old children and their families. Children who qualify must reside within the boundaries of KUSD. Providing these children a base of strong academic skills, self esteem, and a love of learning will lead to stronger attendance, academic performance and higher graduation rates.

### IMPACT

All Head Start staff is employed through the Kenosha Unified School District and follow the contract agreements for their work classification. The monies that are provided in this cost of living adjustment will be dedicated toward any salary increases that may be required, and/or increases in health/dental benefit costs.

### BUDGET IMPACT

Object Level	Descriptive	Amount
100's	Salaries	\$25,987.00
200's	Fringes	\$0.00
300's	Purchased Services	\$0.00
400's	Non-Capital Objects	\$0.00
500's	Capital Objects	\$0.00
		\$0.00
	<b>TOTAL</b>	<b>\$25,987.00</b>

This is a ☒ one-time or a ☐ recurring expenditure

### FUNDING SOURCES

Select Funding Sources: New Funds Requested

Supplemental Head Start Cost-of-Living Adjustment Grant are the new funds requested.

*This page intentionally left blank*

**Kenosha Unified School District  
Kenosha, Wisconsin**

**March 25, 2014**

**EQUIPMENT USE FOR SOFTBALL AND BASEBALL**

**Background**

In an effort to continually service the safety needs of Wisconsin's student athletes, the Wisconsin Interscholastic Athletic Association (WIAA) is continuously working with coaches, athletic directors, and their medical advisory teams. Approximately five years ago, the WIAA added language to the bylaws stating that schools can issue protective equipment in the summer to their students with approval of their governing board for reasons of safety. At that time, the Kenosha Unified School District Board of Education granted schools permission to hand out protective football equipment in the summer.

In April of 2013, the WIAA membership passed this new rule:

**B. UNIFORMS AND EQUIPMENT**

Schools may not issue wearing apparel and protective equipment prior to the first allowable day of practice unless specifically allowed in season regulations for that sport.

One exception is that, with approval of its governing body, schools may issue school uniform or other wearing apparel and protective equipment for use by athletes in training or competition in the summertime. During the school year, with approval of its governing body, a school may issue its baseball and softball equipment at its own discretion. It is acceptable to issue implements at any time if the school wishes, such as vaulting poles, shot puts, hurdles, baseball bats, basketballs, volleyballs, etc. (BL–Art. II and RE–Art. VI, Sect. 2)

Per this new rule, the governing body of Kenosha Unified School District must approve the distribution of school baseball and softball equipment to its students during the school year.

**Rationale**

All equipment has a cost to purchase and a cost to recondition. The rationale for having the governing body approve the equipment use is that it may have an impact on the athletics budget.

During an open gym, a pitching machine can be used which delivers a ball at speeds up to 80 miles per hour. It makes sense that the district provides appropriate tools for students to use

and the proper safety equipment to protect them. Under current practice, students who attend an open gym that do not have their own equipment would not get the opportunity to participate in certain activities that require protective equipment. The cost for the use of district equipment is minimal compared to the risk a student faces without the equipment. This rule change is purely in the interest of safety for student athletes.

### **Recommendation**

At its March 11, 2014, meeting, the Curriculum/Program Standing Committee voted to forward the following recommendations to the School Board for consideration: It is recommended that the Board grant approval for use of protective equipment for softball and baseball during the school year outside of the sport season and, additionally, it is recommended that the Board grant the superintendent and the coordinator of athletics/physical education the authority to approve the use of school equipment should future WIAA sports rules change that are in the best interest for the safety of our students.

Administration recommends that the School board approve the recommendations noted above regarding equipment use for softball and baseball.

Dr. Joseph Mangi  
Interim Superintendent of Schools

Dr. Sue Savaglio-Jarvis  
Assistant Superintendent of Teaching and Learning

Mr. Steven Knecht  
Coordinator of Athletics/Physical Education

**Kenosha Unified School District  
Kenosha, Wisconsin**

**March 25, 2014**

**ELLEVATION PROPOSAL**

**Company History**

Ellevation© is a software company specifically designed to meet the needs of monitoring English Language learners for English-as-a-second language teachers. In 2011 Ellevation was formed when it merged with English as a Second Language Innovations (ESL Innovations). English as a Second Language Innovations was a company started in 2006 in North Carolina by an English-as-a-second-language coordinator. Currently, this group collaborates under the new title Ellevation; and its software is used in over 170 school districts across 25 states (Appendix A).

**Need for Kenosha Unified School District**

During the 2012-13 school year, there were English-as-a-second-language leadership committees formed to help solidify a program for English Language learners in the Kenosha Unified School District. The English-as-a-second-language leadership committees have expressed numerous concerns regarding the amount of time spent on paperwork versus time for teacher collaboration and student instructional time. Currently, the average amount of time spent on initial paperwork is approximately 45 minutes per student. If each teacher services an average of 40 students, each teacher spends approximately 30 hours preparing initial paperwork for the district's English Language learners. This time can be spent providing quality instruction to students and collaboration time with staff servicing Kenosha Unified School District's English Language learners.

The programming leadership branch of the English-as-a-Second-Language Leadership Committee investigated a variety of software programs to try to find which one would best fit the needs of the Office of World Languages and Language Acquisition Program. The committee looked at three different English-as-a-second-language programs, including Ellevation, Imagine Learning, and the Berlitz CyberTeachers program. The members of the programming leadership branch favor the Ellevation program and believe that Ellevation's programming materials would be the best fit for Kenosha Unified School District's English as a second language program. The committee members believe that Ellevation would support teachers with the best software to assign standard-aligned goals to their students and facilitate the teacher collaboration process regarding English Language learners. All of the information was shared with each member of the Office World Languages and Language Acquisition Program through email and a question-and-answer session at a department meeting. Committee members also shared the information learned from Ellevation's software presentation with the Office of Information and Accountability. Due to the benefits described in the section which follows, Ellevation was found

to be the software program to best meet the needs of the district. All of Kenosha Unified School District's English-as-a-second-language teachers and the dual language teachers agree with purchase of the Ellevation program (Appendix B).

### **Benefits for Kenosha Unified School District**

English Language learners account for some of the largest learning gaps in the school district. According to the official Third Friday Enrollment Report, the total number of identified English language learners is 1,811. The majority of the English Language learners are at the elementary level (1,032) followed by high schools (354) and then middle schools (345).

The Office of World Languages and Language Acquisition Program philosophy states:

Kenosha Unified School District's Language Acquisition Program supports the linguistic and academic success of all its culturally and linguistically diverse students. This is provided collaboratively through a personalized, enriching, and trusting multicultural environment in which culturally and linguistically diverse students develop twenty-first century skills that prepare them to be lifelong learners who participate in a global society.

English-as-a-second-language teachers help to support the academic success of the English Language learners. The Ellevation software would help them achieve this by:

- Generating reports to help monitor student progress.
- Allowing English-as-a-second-language and general education teachers to collaborate with "can do" statements for each English Language proficiency level (Appendix C).
- Allowing English-as-a-second-language teachers to collaborate with general education teachers in goal setting for each individual student (Appendix D).
- Generating reports to service students in need of special attention or those who are failing to meet annual goals.

Supporting the World Class Instruction Design and Assessment (WIDA) English Language development standards (ELD Standards), the purchase of Ellevation would also be beneficial for English-as-a-second-language teachers by:

- Generating all Title III paperwork and translating these documents into 29 different languages (Appendix E).
- Keeping track of the district's annual measurable achievement objectives (AMAOs).

- Generating individualized plans for each English Language learner.
- Working collaboratively with WIDA to upload test scores to the Ellevation database.
- Generating student plans to share with general education teachers facilitating collaboration.

Ultimately, the addition of the Ellevation program in the district would save teachers time working on the paperwork listed above and allowing them more time to be in classrooms with English language learners.

The district's English-as-a-second-language staff currently is responsible for the following activities:

Annual Tasks for English-as-a-Second Language/  
Language Acquisition Program Teachers

REQUIREMENT	TIMELINE	TASK
<b>Initial Identification of English Language Learners</b>	<ul style="list-style-type: none"> <li>• August/September</li> <li>• Ongoing</li> </ul>	<ul style="list-style-type: none"> <li>• Familiarize yourself with World-Class Instructional Design and Assessment (WIDA) standards and Common Core State Standards.</li> <li>• New hires must complete online training for the WIDA Assessing Comprehensive and Communication in English State-to-State for English Language Learners (ACCESS) Placement Test before administering screener.</li> <li>• Collect enrollment forms.</li> <li>• Review student's previous academic history (i.e.,</li> </ul>

REQUIREMENT	TIMELINE	TASK
		<p>WISEdash).</p> <ul style="list-style-type: none"> <li>• Administer screener (WIDA Measure of Developing English Language for kindergarten and WIDA ACCESS for English Language Learners for grades 1 through 12).</li> <li>• Create a red folder.</li> <li>• Place screener results in the red folder.</li> <li>• Complete the update form, and send original to the Office of World Languages and Language Acquisition Program within two weeks.</li> <li>• Arrange parent meeting to discuss student status.</li> <li>• Send the updated form to the Office of World Languages and Language Acquisition Program when parent response is received.</li> </ul>



<b>REQUIREMENT</b>	<b>TIMELINE</b>	<b>TASK</b>
<b>Parent Notification</b>	<ul style="list-style-type: none"> <li>• Within 30 days of being assessed for limited English proficient</li> <li>• For new enrollees within two weeks of being screened</li> </ul>	<ul style="list-style-type: none"> <li>• Document parent meeting and obtain appropriate signatures.</li> <li>• Signatures are required to receive or decline services.</li> </ul>
<b>Language Development Plans</b>	<ul style="list-style-type: none"> <li>• Ongoing</li> </ul>	<ul style="list-style-type: none"> <li>• Create plan with specific support, accommodations, and modifications.</li> <li>• Collaborate with personnel regarding student support.</li> <li>• Review the plan to ensure the student is meeting language development goals.</li> </ul>
<b>Accommodations for All District and State Standardized Tests</b>	<ul style="list-style-type: none"> <li>• Check testing windows at your buildings.</li> </ul>	<ul style="list-style-type: none"> <li>• Communicate the accommodations with teachers.</li> <li>• Ensure students receive accommodations.</li> </ul>
<b>ACCESS</b> <ul style="list-style-type: none"> <li>• Testing</li> <li>• Planning</li> <li>• Training</li> <li>• Data Review</li> </ul>	<ul style="list-style-type: none"> <li>• End of November to end of May  (Check testing windows.)</li> </ul>	<ul style="list-style-type: none"> <li>• Attend ACCESS for ELLs (English Language learners) workshop.</li> <li>• Conduct WIDA online testing assessment, and send results to the coordinator of world languages and language acquisition program.</li> <li>• Create a schedule for students (test coordinator).</li> </ul>

REQUIREMENT	TIMELINE	TASK
		<ul style="list-style-type: none"> <li>• Complete appropriate assessments.</li> <li>• Attend ACCESS for ELLs interpretation workshop.</li> <li>• Review data for accuracy.</li> <li>• Place a copy of ACCESS scores in student's red folder.</li> </ul>
<b>Monitoring Students (English Language Proficiency 6.1 and 6.2)</b>	<ul style="list-style-type: none"> <li>• Ongoing</li> </ul>	<ul style="list-style-type: none"> <li>• Monitor students who have English Language Proficiency 6.1 and 6.2.</li> <li>• Communicate with the general education teacher.</li> </ul>
<b>M a n u a l Recl assi fica tion / De- classification (Based on ACCESS Scores)</b>	<ul style="list-style-type: none"> <li>• End of April through May</li> </ul>	<ul style="list-style-type: none"> <li>• Determine manual reclassification or declassification.</li> <li>• Send update forms to Office of World Languages and Language Acquisition Program.</li> <li>• Keep copy in red folder.</li> <li>• Obtain documents and signatures.</li> </ul>
<b>Exiting Students</b>	<ul style="list-style-type: none"> <li>• May/June</li> </ul>	<ul style="list-style-type: none"> <li>• Send exiting letter home for students who fulfilled exit requirements.</li> <li>• Copy letter and place in red folder.</li> </ul>

REQUIREMENT	TIMELINE	TASK
		<ul style="list-style-type: none"> <li>• Update red folder.</li> <li>• Obtain parent signature.</li> <li>• Monitor student if necessary.</li> </ul>
<b>C o u r t e s y C o m m u n i c a t i o n s Between Staff</b>	<ul style="list-style-type: none"> <li>• May/June</li> </ul>	<ul style="list-style-type: none"> <li>• Middle school teachers communicate with high school teachers.</li> <li>• Elementary teachers communicate with middle school teachers.</li> </ul>
<b>End of Year</b>	<ul style="list-style-type: none"> <li>• May/June</li> </ul>	<ul style="list-style-type: none"> <li>• Conduct incoming kindergarten screeners</li> </ul>

### **Training and Implementation**

With the purchase of the Ellevation program, representatives from the company would offer two days of training for the district's English-as-a-second-language staff and administration. The training would include:

- Kristopher Keckler: Information and Accountability
- Renee Blise: Information and Accountability
- Sarah Smith: World Languages and Language Acquisition Program
- Personnel from Informational Services (to be assigned at a later date for implementation and support)

The goals for this session are:

- Build an understanding of Ellevation, and begin to make decisions about how product features will be used in the district.
- Set goals and create an implementation plan for using Ellevation in the district (tasks, owners, due dates, ongoing calendaring).

- Review the district database and make additional customizations, if applicable.
- Learn how to perform Ellevation administration tasks.
- Make decisions about the user training (how to set expectations and which training modules and what modifications should be covered, if any).

### **User/Teacher Training**

The two-hour user and teacher training would include:

- One principal or assistant principal from each school.
- All English-as-a-second-language teachers in the Kenosha Unified School District.
- All dual language teachers in the Kenosha Unified School District.

The teacher training is scheduled one to two weeks after the leadership training has been completed.

The goals for user/teacher training are:

- Be introduced to Ellevation and be able to navigate the product.
- Understand the roles and responsibilities as an Ellevation user in the district.
- Be able to use Ellevation to manage English Language learner student data and to generate reports and analyses that can inform instructional and programmatic decisions.

### **Continued Learning and Troubleshooting**

In addition to the training sessions, Ellevation offers free webinars every month for teachers and administration. The Ellevation Partner Support Team (PST) would help troubleshoot any software-related issues, including help desk and data integration. User questions, technical problems, and software-related problems are resolved through the Ellevation help desk.

### **District Support**

The Office of World Languages and Language Acquisition Programs and the Office of Information and Accountability will work together to create a usage plan for the district. This plan will include:

- Setting permissions for the administration menu (permissions, type of support, etc.).
- Customizing the software and setting goals and due dates for Kenosha Unified School District.
- Making decisions regarding other users and teacher training.

The two departments would also work closely together analyzing data from the software to monitor the entrance and exits of the district's English language learners and specifically recognize the schools with students who are not meeting state and district expectations.

### **Funding**

The purchase of this software is \$26,250, which includes:

- Onsite training for administration and teachers (two days, two- to three-hour sessions).
- User data for 70 teachers and administrators.
- Standardized data importation for 2,000 English Language learners.
- Free monthly webinars.
- Software guidance through the Ellevation help desk.

Funding would come from Title III in the 2014-15 school year.

### **Recommendation**

At its March 11, 2014, meeting, the Curriculum/Program Standing Committee voted to forward this report to the School Board for consideration. Administration recommends that the School Board approve the Ellevation software proposal as presented.

Dr. Joseph Mangi  
Interim Superintendent of Schools

Dr. Sue Savaglio-Jarvis  
Assistant Superintendent of Teaching and Learning

Mrs. Sarah Smith  
Coordinator of World Languages and Language Acquisition Program

## NATIONAL REACH

- 25 States,
  - 170+ Districts
  - Big & Small
  - Urban & Rural
- *Notable Districts:*  
Charlotte Mecklenburg,  
OKC, Duval County,  
Lawrence, MA
- *Partnerships:*  
Pearson, WIDA,  
Michael & Susan  
Dell Foundation



Elevation Software

I have reviewed the Elevation Software for the English Language Learners and I strongly believe this would support our Language Acquisition Program.

Print Name	Signature	Print Name	Signature
1. Jamie Sanders	Jamie Sanders	27. Caitlin Hanson	Caitlin Hanson
2. Jennifer Maggaard	Jennifer Maggaard	28. Alison Wild	Alison Wild
3. Kate Keew	Kate Keew	29. Susan Johnson	Susan Johnson
4. Sarah Green	Sarah Green	30. Moises Valles	Moises Valles
5. Satya Thompkins	Satya Thompkins	31. Maggie Torres	Maggie Torres
6. Kristal Krebs	Kristal Krebs	32. Berkeelin	Berkeelin
7. Peter Smith	Peter Smith	33. Harpuneet Singh	Harpuneet Singh
8. Francisca Peters	Francisca Peters	34. Paula Stachon	Paula Stachon
9. Jyrmie Wright	Jyrmie Wright	35. Zill Waud	Zill Waud
10. Sarahna Tripodi	Sarahna Tripodi	36. Katherine Anderson	Katherine Anderson
11. Ursula Sepulveda	Ursula Sepulveda	37. Carmen Carreón	Carmen Carreón
12. Sarah Gómez	Sarah Gómez	38. Mike Mores	Mike Mores
13. Janet Hughes	Janet Hughes	39. Patricia Larre	Patricia Larre
14. Karla Brown	Karla Brown	40. Kelly Connolly	Kelly Connolly
15. Sabana Wood	Sabana Wood	41. Sarah Smith	Sarah Smith
16. Jill Francis	Jill Francis	42. Fernando Delgado	Fernando Delgado
17. Natalie Mann	Natalie Mann	43. Patricia Allen	Patricia Allen
18. Michelle Brax	Michelle Brax	44. M. Serpe	M. Serpe
19. Carrie Borst	Carrie Borst	45. Adam Parobik	Adam Parobik
20. Chah Core	Chah Core	46. Brian Beni	Brian Beni
21. Karen DeChene	Karen DeChene	47. Patricia Ngema	Patricia Ngema
22. Angela Hart	Angela Hart	48. Alexander Beal	Alexander Beal
23. Courtney Landwehr	Courtney Landwehr	49. Amy Miceli	Amy Miceli
24. Mary DeGree	Mary DeGree	50. Carmen L. Delgado	Carmen L. Delgado
25. Abigail Stanislawski	Abigail Stanislawski	51. Linda Rosales	Linda Rosales
26. Amy Baratta	Amy Baratta	52. Kathie Beyer	Kathie Beyer





Print Name	Signature	Print Name	Signature
53. <del>Maria</del> M. Gray		61. Elsa Anaya	
54. Kelly Hanover		62. M. Escobedo	
55. Michelle Gross		63. M. Sanchez	
56. Ashley Weiss		64. M. Godina	
57. Athena Burmeister		65. <del>M. Escobedo</del>	
58. Nibia E. Cruz		66. <del>M. Escobedo</del>	
59. Alma Escamilla		67. Katherine Martinez	
60. N. Meulbraek		68. Sonja Cruz	
		69. Rebecca Fritz	
		70.	
		71. Chris Grimm	
		72. Lynette Harty	



## E. Example WIDA ELD Standards Report (excerpt)

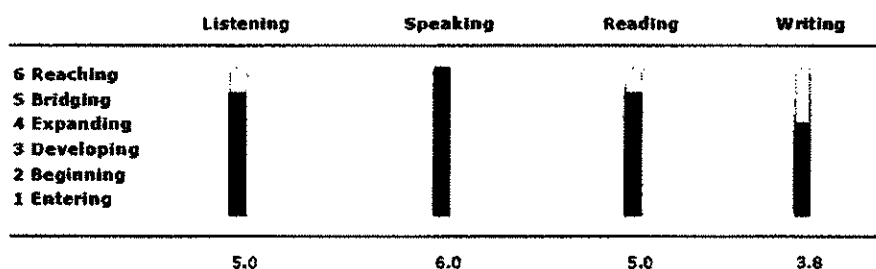
<b>Date:</b> 2/19/2013	<b>WIDA ELP Standards Report</b>	<b>Report:</b> WIDASTD01
<b>Time:</b> 8:28 PM	AA-Demo City Schools	<b>Page:</b> 1

Filter: All Standards (1-5), Both: Formative and Summative, Of the selected Students, those with any type of ELP scores are included.

---

<b>Student:</b> Rafael C Abuassaf	<b>Test Date:</b> 3/17/2011
<b>Student #:</b> 1002002462	<b>Grade Level:</b> 8
<b>Date of Birth:</b> 05/31/1998	<b>ELP Test Type:</b> ACCESS for ELLs
<b>School:</b> Kennedy Junior High School (333)	<b>Cluster:</b> Grades 6-8

## Test Results



Note: Performance Definitions for the Levels of English Language Proficiency in Grades K-12 are available in the *CAN DO Performance Definitions* listing.

## \*WIDA CAN DO Descriptors

At this LEP student's level of English proficiency, you can expect that they will be able to:

Listening	Speaking	Reading	Writing
<ul style="list-style-type: none"> <li>Use oral information to accomplish grade-level tasks</li> <li>Evaluate intent of speech and act accordingly</li> <li>Make inferences from grade-level text read aloud</li> <li>Discriminate among multiple genres read orally</li> </ul>	<ul style="list-style-type: none"> <li>Student has achieved English proficiency in this domain.</li> </ul>	<ul style="list-style-type: none"> <li>Differentiate and apply multiple meanings of words/phrases</li> <li>Apply strategies to new situations</li> <li>Infer meaning from modified grade-level text</li> <li>Critique material and support argument</li> <li>Sort grade-level text by genre</li> </ul>	<ul style="list-style-type: none"> <li>Produce short paragraphs with main ideas and some details (e.g., column notes)</li> <li>Create compound sentences (e.g., with conjunctions)</li> <li>Explain steps in problem-solving</li> <li>Compare/contrast information, events, characters</li> <li>Give opinions, preferences, and reactions along with reasons</li> </ul>

WIDA ELP Standards © 2007 Board of Regents of the University of Wisconsin System. WIDA is a trademark of the Board of Regents of the University of Wisconsin System. For more information on using the WIDA ELP Standards please visit the WIDA website at [www.wida.us](http://www.wida.us). The WIDA CAN DO descriptors work in conjunction with WIDA Performance Definitions of the English language proficiency standards. The Performance Definitions use three criteria (1. Linguistic complexity; 2. Vocabulary usage; and 3. Language control) to describe the increasing quality and quantity of students' language processing and use across the levels of language proficiency.

### Ellevation Goal Center

Setting goals and monitoring progress is essential, especially for educators working closely with English Language Learners. The *Ellevation Goal Center* enables districts and individual teachers to assign standards-aligned goals to their students, using the Ellevation Goal Bank to easily select an appropriate, pre-authored goal. Educators can then dynamically track progress against those goals and analyze reports showing progress for individual students or entire cohorts of ELL students.

The screenshot shows the Ellevation Goal Center interface for student Rafael C Abuassaf at Kennedy Junior High School. The interface includes a header with navigation tabs (Demographics, Goals, Reports, etc.) and a student profile section. The student's grade is 8, language is Arabic, and LEP status is ELL. A composite goal of 3 - Developing is shown, broken down by skill: Listening (4 - Expanding), Speaking (4 - Expanding), Reading (3 - Developing), Writing (3 - Developing), and Literacy (3 - Developing). A message states 'Your changes have been saved.' Below this, there's a 'Goals' section with a dropdown for '2013/2014 - Year' and a '+ Add Year/Semester' button. A 'Demo Video' button and a link to 'Download the Student Goals manual (pdf)' are also present. The main area displays a list of goals. The first goal is '3-5 Listening: Level 3 Student moving to Level 4', with a description of the student's progress and a list of 'Can Do Descriptors'. The second goal is '6-8 Reading: Level 3 Student moving to Level 4', also with a description and 'Can Do Descriptors'. A progress indicator shows 'On track' with a green bar and a '[History]' link.

**Rafael C Abuassaf** 1002002462 Kennedy Junior High School

Grade: 8  
Language: Arabic  
LEP Status: ELL

Composite: 3 - Developing  
Listening: 4 - Expanding Speaking: 4 - Expanding  
Reading: 3 - Developing Writing: 3 - Developing  
Literacy: 3 - Developing

Your changes have been saved.

Goals: 2013/2014 - Year + Add Year/Semester

[Demo Video](#)  
[Download the Student Goals manual \(pdf\)](#)

Type	Goal	Progress
Listening	<b>3-5 Listening: Level 3 Student moving to Level 4</b> Student will move from a Level 3 (Developing) to a Level 4 (Expanding) in Listening by demonstrating mastery of the following Can Do Descriptors: <ul style="list-style-type: none"> <li>Follow multi-step oral directions</li> <li>Identify illustrated main ideas from paragraph-level oral discourse</li> <li>Match literal meanings of oral descriptions or oral reading to illustrations</li> <li>Sequence pictures from oral stories, processes, or procedures</li> </ul> [Edit] [Remove]	On track <a href="#">[History]</a>
	<b>6-8 Reading: Level 3 Student moving to Level 4</b> Student will move from a Level 3 (Developing) to a Level 4 (Expanding) by demonstrating mastery of the following Can Do Descriptors: <ul style="list-style-type: none"> <li>Identify topic sentences, main ideas, and details in paragraphs</li> </ul>	

### ELL Student Plans

Ellevation is the only software platform that brings together all the elements of an individualized language plan, which serves as a core instructional roadmap for students. Having all of a student's information in one place gives all stakeholders a common form on which to track progress, helping to ensure that ELLs successfully acquire the language skills they need to access the rigorous content of the classroom. See [Appendix B](#) for an example *ELL Student Plan*.

#### D. Monitors Student Progress

See Response to *Section II, A*

#### E. Allows ESL & General Education teachers to collaborate for each level of ELP

### C. Example Parent Letter in English (excerpt)

#### Notification of English Language Program Placement

**Student:** Rafael C Abuassaf  
**Grade Level:** 8

**School:** Kennedy Junior High School  
**LEP Status:** ELL

Our school district provides a program of language instruction for English Language Learners (ELLs) to attain English proficiency, and meet the same challenging academic content and student achievement standards expected of all students.

Upon enrollment, a language other than English was noted on your child's Home Language Survey. According to state and federal law, our school district is required to assess the English language proficiency of your child in listening, speaking, reading, and writing. Based on the results of the ACCESS for ELLs, a state-approved assessment for measuring English language proficiency, we are pleased to inform you that your child is eligible for services for English Language Learners. Below, please find results that have informed our decision, information about our language programs, and your rights as a parent.

Rafael took the ACCESS for ELLs on 03/17/2013 and their ELP assessment results are listed below:

Listening	Writing	Reading	Speaking	Composite
4.0	3.8	3.8	4.0	3.8

The ACCESS for ELLs test results are ranked into the following categories:

#### # - Proficiency Level - Description

- 1 - **Entering** - Knows and uses minimal social language and minimal academic language with visual support
- 2 - **Emerging** - Knows and uses some social English and general academic language with visual support
- 3 - **Developing** - Knows and uses social English and some specific academic language with visual support
- 4 - **Expanding** - Knows and uses social English and some technical academic language
- 5 - **Bridging** - Knows and uses social and academic language working with grade level material
- 6 - **Reaching** - Knows and uses social and academic language at the highest level measured by this test

#### Additional factors used to determine your child's placement:

Classroom performance

Teachers of English Language Learners provide a variety of specialized services until students demonstrate skills in English sufficient for them to succeed academically in the regular classroom. Your child receives the following English language development instruction:

**Tutoring:** 2 times per Week for a duration of 1:00.

**English Language Tutoring (ELT):** One-on-one or small group tutoring/assistance to ELLs outside of school hours, concentrated on accelerating English language proficiency.

While the rate of English language development (ELD) varies between students, many exit the ELD program in 6 years. Your child's English language development will be assessed annually until he/she achieves Overall score of 5.2 on the ACCESS for ELLs, and meets specific academic achievement requirements. Students who exit the program are monitored for academic success for two years.

All children, regardless of English proficiency, are eligible to participate in all school-wide programs. If your child has an Individualized Education Plan (IEP), or a 504 plan, the language instruction educational program will be utilized in coordination with your child's existing plan.

Throughout the school year, you will have many opportunities to learn about your child's progress in academics and learning English. I encourage you to attend parent-teacher conferences and school events to support your child's academic success. Your efforts will help us meet the 2013/2014 expected rate for graduation of 99%.

As a parent, you have the right to decline enrollment in a program or type of service, withdraw your child from the program at any time, or choose another program if available. If you have any questions about your child's placement or the type of program options available to you, please contact \_\_\_\_\_ at \_\_\_\_\_

## PURCHASE/CONTRACT RATIONALE

Per School Board Policy 3420, please complete the following to be attached to your purchase order/contract. Additional information may be required and presented before the District's School Board for approval. Your submission must allow for adequate time for the Board to approve.

Vendor: **Ellevation, LLC**

Purchased Good/Program: English as a second language software

Start Date/Date Needed: July 1, 2014

### 1. PURPOSE – What is the purpose of the proposed purchase?

During the 2012-2013 school year, there were English as a second language leadership committees formed to help solidify a program for our English language learners in the Kenosha Unified School District. The English as second language leadership committees have expressed numerous concerns regarding the amount of time spent on paperwork versus time for teacher collaboration and student instructional time. Currently, the average amount of time spent on initial paperwork is approximately 45 minutes per student. If each teacher services an average of 40 students, each teacher spends approximately 30 hours preparing initial paperwork for our English language learners. This time can be spent providing quality instruction to students and collaboration time with staff servicing Kenosha Unified School District's English language learners. The members of the committee began to research various programs to assist them with their monitoring activities and collaboration. The products researched included Ellevation, Imagine Learning, and the Berlitz CyberTeachers program. The programming committee found the Ellevation program to be the best fit for Kenosha Unified School District.

The Ellevation software provides English as second language educators the tools to assist them with increasing productivity, improving teacher collaboration, and facilitating correspondence to parents by translating Title III paperwork into 29 different languages. This purchase of this software would ultimately give the English as a second language teachers more time to spend in the classroom with English language learners.

2. FUNDING – What is the total cost of purchase and the funding source?

The funding source would come from Title III and would be approximately \$26,250.00.

3. REQUEST FOR PROPOSAL (RFP) – indicate if an RFP has been completed

YES ☒

NO ☐ If no, please request an RFP packet

4. EDUCATIONAL OUTCOME – What is the educational outcome of this purchase?

Ellevation will help educators collaborate and create goals for our English language learners. Ellevation will also assist the English as a second language teachers and general education teachers with monitoring the achievement of English language learners and will help with the continuous improvement process of our English

5. START DATE – When is the anticipated start date?

The anticipated start date would be July 1<sup>st</sup>, 2014.

**Your response does not establish approval of either a contract or a purchase order.**

Appropriate Leadership Signature \_\_\_\_\_ Date \_\_\_\_\_

**KENOSHA UNIFIED SCHOOL DISTRICT  
REQUEST FOR PROPOSAL  
(THIS IS NOT AN ORDER)**

Date: December 17, 2013

RFP Number: 4854 - ENGLISH AS A SECOND LANGUAGE SOFTWARE

Date Due: January 15, 2014 AT 2:30 PM

PROPOSALS WILL BE RECEIVED AT THE  
KENOSHA UNIFIED SCHOOL DISTRICT PURCHASING OFFICE  
3600 52ND STREET, KENOSHA, WI 53144  
FOR MORE INFORMATION, CALL (262) 359-6338

**VENDOR SIGN AND RETURN ONE ORIGINAL, ONE PAPER COPY AND ONE ELECTRONIC COPY**

INDIVIDUAL SIGNING THIS SECTION ACKNOWLEDGES THAT THEY HAVE READ THE KENOSHA UNIFIED SCHOOL DISTRICT REQUEST FOR PROPOSAL #4854 - ENGLISH AS A SECOND LANGUAGE SOFTWARE AND CERTIFIES THAT THE NAMED ORGANIZATION AGREES TO AND IS ABLE TO MEET THE REQUIREMENTS AS LISTED IN THIS RFP. INDIVIDUAL SIGNING THIS RFP ALSO CERTIFIES THAT INFORMATION CONTAINED HEREIN IS TRUE AND CORRECT TO THE BEST OF THEIR KNOWLEDGE.

COMPANY NAME: Ellevation, LLC  
ADDRESS: 211 Congress St  
10<sup>th</sup> Floor  
PHONE NUMBER: 617 307 5757  
EMAIL ADDRESS: teddy@ellevationeducation.com

THE UNDERSIGNED AGREES TO FURNISH THE SERVICES DESCRIBED AT THE NET PRICE QUOTED SUBJECT TO THE STATED CONDITIONS

**GENERAL CONDITIONS**

1. Quote all prices less any applicable Federal Excise or State Sales Taxes.
2. Quote all prices F.O.B. destination in Kenosha
3. Unit prices will govern if price extensions are in error.
4. KUSD reserves the right to select the unit considered most suitable for its use and to award items individually, in combination, or not at all.
5. Quoted prices to remain firm for 60 days.

PRINT NAME: Teddy Rice  
TITLE: President & Co-Founder  
SIGNATURE: Teddy Rice  
DATE: 01.09.14

## REFERENCE DATA SHEET

*(TO BE COMPLETED AND SUBMITTED WITH BID)*

**QUALIFICATIONS:** Firms shall have the capability and capacity in all respects to fulfill the contractual requirements to the satisfaction of all participating government agencies.

Indicate the length of time you have been in business as a company providing the type of service required for this contract. 6 years 8 Months

Provide a minimum of three (3) references that may substantiate past work performance and experience in the type of work required for this contract.

1. Company: Whitewater Unified School District  
Address: 419 S. Elizabeth Street  
Whitewater WI 53190  
Contact: Landra Heim  
Phone: 262-472-8712  
E-mail: lheim@wwusd.org
2. Company: Tulsa Public Schools  
Address: 3027 South New Haven  
Tulsa OK 74114  
Contact: Laura Grisso  
Phone: 918-637-4359  
E-mail: grissla@tulsaschools.org
3. Company: Johnston County Schools  
Address: 2320 US 70 Business Highway East, PO Box 1336  
Smithfield NC 27577  
Contact: Ana Milazzotto  
Phone: 919-934-4361 x371  
E-mail: anamilazzotto@johnston.k12.nc.us





## **Request for Proposal**

**RFP #4854 – English as a Second Language Software**

**Due: 2:30 pm, Wednesday, January 15, 2014**

Kenosha Unified School District  
3600 52<sup>nd</sup> St.  
Kenosha, WI 531444

### **Contacts:**

Robert Hofer – Purchasing  
262-359-5914  
[rhofer@kUSD.edu](mailto:rhofer@kUSD.edu)

Sarah Smith  
262-359-6199  
[sshanebr@kUSD.edu](mailto:sshanebr@kUSD.edu)



## Table of Contents

I.	Executive Summary.....	3
II.	Requirements of English as a Second Language Software.....	5
	A. <i>RFP Requirement #1: Monitors the Progress of ELLs</i>	
	B. <i>RFP Requirement #2: Helps Teachers and Administrators Manage ESL Programs</i>	
	C. <i>RFP Requirement #3: Helps Teachers and Administrators Increase ELL Achievement</i>	
	D. <i>RFP Requirement #4: Monitors Student Progress</i>	
	E. <i>RFP Requirement #5: Allows ESL &amp; General Education teachers to collaborate for each level of ELP</i>	
	F. <i>RFP Requirement #6: Allows ESL &amp; General Education teachers to collaborate for each individual student</i>	
	G. <i>RFP Requirement #7: Translates Title III paperwork into other languages</i>	
	H. <i>RFP Requirement #8: Pulls records of students by school/district that are in need of special attention and not meeting AMAOs</i>	
	I. <i>RFP Requirement #9: Supports WIDA's ELD standards</i>	
	J. <i>RFP Requirement #10: Describe briefly the current usage of your program</i>	
	K. <i>RFP Requirement #11: How long has your program been in use?</i>	
	L. <i>RFP Requirement #12: Is training provided for admin and teachers?</i>	
	M. <i>RFP Requirement #13: Is it Title III approved?</i>	
	N. <i>RFP Requirement #14: Can it import student information?</i>	
	O. <i>RFP Requirement #15: Can it pull testing information from WIDA and Metritec?</i>	
	P. <i>RFP Requirement #16: Can it track students from school to school within district?</i>	
	Q. <i>RFP Requirement #17: Program Cost?</i>	
III.	Appendices.....	29
	A. <i>Example District Monitoring Form</i>	
	B. <i>Example ELL Student Plan</i>	
	C. <i>Example Parent Letter: Notification of ELP Test Results (English)</i>	
	D. <i>Example Parent Letter: Notification of ELP Test Results (Spanish)</i>	
	E. <i>Example: WIDA ELD Standards Report</i>	



## I. Executive Summary

Ellevation is a software company focused exclusively on English Language Learners (ELLs) and the educators that serve them. The web-based Ellevation software platform provides educators with a suite of tools that helps them enhance instruction, increase productivity, and improve collaboration. In so doing, Ellevation helps improve academic outcomes for ELLs so that they can achieve their highest aspirations.

This proposal describes in detail the components of Ellevation's English as a Second Language Software. Specifically, and consistent with Kenosha Unified School District's (KUSD) requirements, Ellevation helps educators automatically:

- Collect a wide array of ELP data and run reports to show student performance and growth
- Create individualized student plans aligned to WIDA ELD standards
- Generate required letters to parents in 28 languages
- Track testing accommodations and classroom modifications
- Establish standards-aligned goals for ELLs, and enable collaborative progress tracking
- Easily monitor exited students
- Update student data continuously and integrate with a district's Student Information System (SIS)

As the following proposal illustrates, our system includes all of the functionality identified in the KUSD Request for Proposal, and much more. Ellevation has extensive experience delivering the functionality outlined in the RFP and providing top quality training and implementation support to ensure customer success. In addition to our track record and ability to deliver the system outlined in the RFP, there are a number of additional advantages that Ellevation can offer KUSD, including:

**Deep Knowledge of Wisconsin:** Ellevation currently serves a number of districts in the state of Wisconsin, including Whitewater Unified, Greendale Arcadia and Kewaunee School Districts. We are familiar with state regulations and requirements and can ensure that our software continues to reflect a deep understanding of state guidelines.

**WIDA Partnership:** Ellevation has a long-standing and partnership with WIDA. With a subscription to Ellevation, KUSD educators will have easy access to WIDA's CAN DO Descriptors, MPIs, research-based standards and the ability to generate standards-aligned reports that are individualized for each student.

**Best-in-Class Training and Implementation Support:** Our Partnership Support Team has deep domain expertise, including former educators who have worked with ELL students. As the only national company of its kind, our team has unique insights into policy and practice that informs an excellent focus on serving ESL programs. Ellevation will provide in person training, access to our help desk, multiple training webinars, and much more.

**Affordability:** Ellevation's pricing is simple and affordable. The per-user rates described in the *Program Cost* section are inclusive of all training and implementation support noted above. Further, Ellevation's multi-year discounts reward district partners for a multi-year commitment to the Ellevation platform.

**Continuous Product Improvement Process:** We are never satisfied. At Ellevation, we embrace feedback from all of our users and are constantly innovating. While we are ready to deliver a solution that addresses all of KUSD's requirements, we will continue to enhance the platform over the course of this partnership – at no additional cost.

Ellevation's solution extends well beyond the actual ESL Software System. By providing training, implementation and professional development services, we see ourselves as a partner that will work collaboratively with you to ensure that the objectives for your students, educators, and schools are achieved.



## II. Requirements of English as a Second Language Software

This section provides specific responses to the seventeen requirements or questions outlined in RFP #4854.

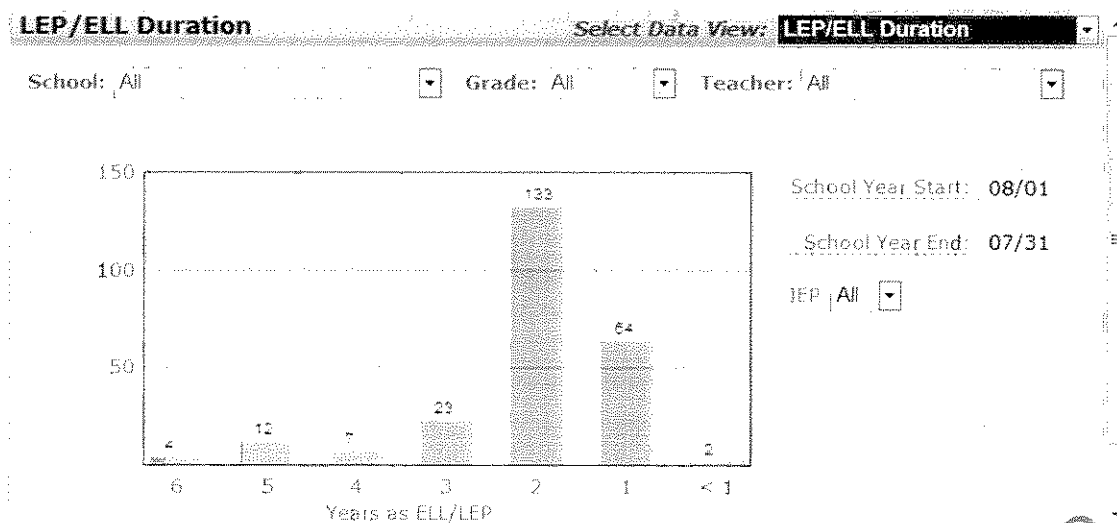
### A. Monitors the Progress of ELLs

The Ellevation platform is designed to help educators and administrators monitor the progress of ELLs. We know this can be difficult, given the high mobility of ELL students, the specialized pedagogy of language acquisition, and the many demands on educators' time. As the only software product of its kind in the market, Ellevation helps educators organize ELL student data in one place, generate reports and analyses that help monitor progress on ELD assessments, and even help track your ELL students after they have exited your program. The screenshots below highlight just a few of the ways in which Ellevation helps monitor ELL progress:

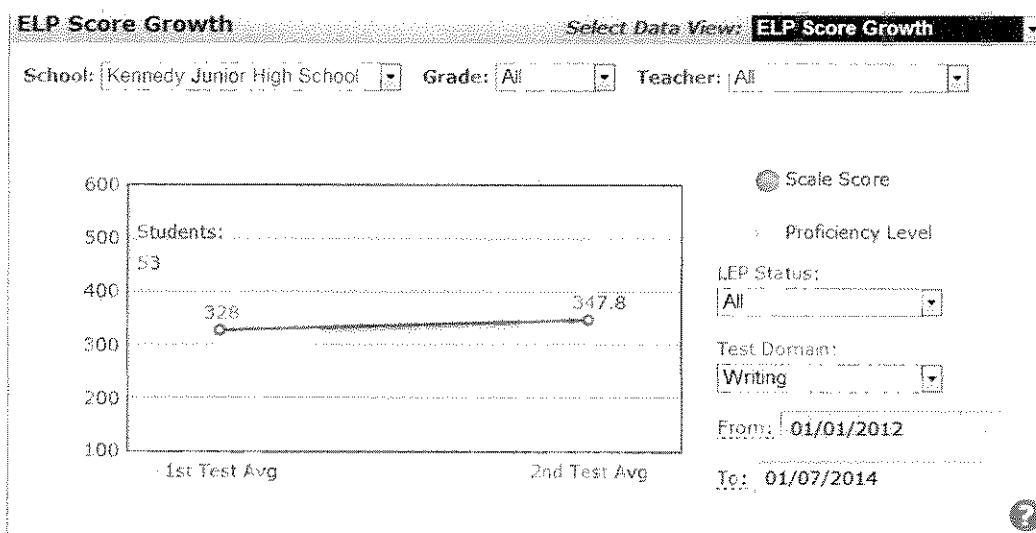
**Demographics:** Keeping track of a highly mobile ELL family can be a challenge. Ellevation helps you track an array of demographic information, such as the # of years in an ELL program (see example below). Reports like these can help educators and administrators understand the proper kinds of programming needed to ensure compliance and student success:

#### DATA QUICKVIEW

Click on any group of students to view them in the Data Dashboard



**Assessments:** Ellevation stores historical ELP assessment information and provides insightful analysis of individual and cohort language acquisition progress. The screenshot below shows a year-over-year comparison of a school's performance on Writing, as measured by scale score growth on a WIDA ACCESS for ELLs assessment:



**Monitoring:** Ellevation gives administrators the tools they need to organize a Monitoring Program for FLEP students. This includes an authoring tool that allows users to create their own monitoring forms. An *example* of one district monitoring form is included in **Appendix A**.

## B. Helps Teachers and Administrators Manage ESL Programs

The Ellevation software platform was initially conceived by an ESL teacher/coordinator in North Carolina. As such, many of the features within Ellevation are directly supportive of excellent program administration. Once a district partner begins using Ellevation, they almost never stop using it – it becomes an indispensable tool for ensuring compliance, saving time, and supporting instructional excellence. Below are just a couple of examples of how Ellevation supports the day-to-day management of your program:

1. Indicate *testing tiers* for WIDA ACCESS for ELLs, which helps organize the cumbersome process of ordering tests for Spring assessment;
2. Track the preferred *home language* of the student's family, so that parent letters are translated into the proper language (not always the same as the child's first language);
3. Document *important dates* such as when a student exited an ESL program and began a monitoring program, so that 2-year monitoring requirements are met and documented;
4. Record the *number of years in US schools* for the purposes of tracking immigrant counts, so that KUSD receives appropriate federal revenues;
5. Track *services offered* to each student, at what time, and by which teacher, so that KUSD can keep track of ESL services and schedules.

...and much more.

## C. Helps Teachers and Administrators Increase ELL Achievement

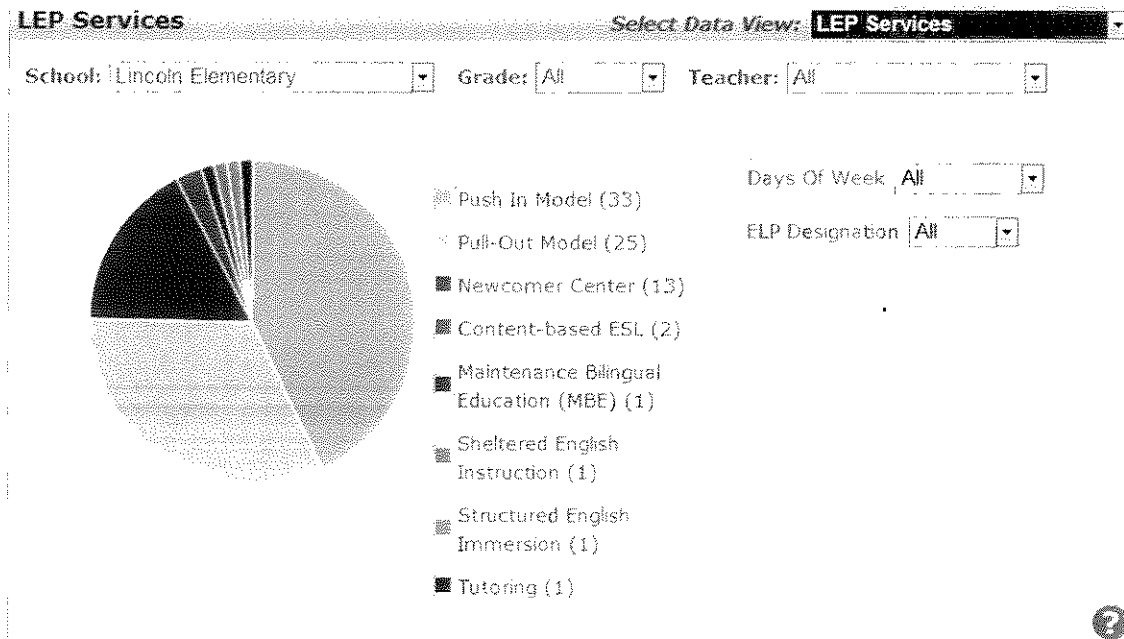
Ellevation was founded to give educators and administrators the software tools they need to increase ELL achievement. On the Ellevation platform, this starts with our *Data Dashboard*, which helps educators understand where their students are with respect to language proficiency. It continues with our *Ellevation Goal Center*, which gives educators the ability to assign standards-aligned goals to their students and then



track progress against their performance. Finally, the platform provides dozens of reports that help educators guide instruction for students, like the *ELL Student Plan* used by educators across the country.

### Data Dashboard

The Ellevation *Data Dashboard* enables all Ellevation users – teachers, specialists, administrators, principals, and others – to view the district’s ESL-related data in graphical format, use filters to cut data in needed ways, and easily save, print, or export the data and related reports. Currently, there are 9 different data views. One of the more popular views indicating LEP Services is excerpted below; note that these views can be filtered by school, grade, and teacher to facilitate better collaboration around student data. It is important that educators and administrators understand what kind of programming they are delivering to students in order to increase achievement.





## Ellevation Goal Center

Setting goals and monitoring progress is essential, especially for educators working closely with English Language Learners. The *Ellevation Goal Center* enables districts and individual teachers to assign standards-aligned goals to their students, using the Ellevation Goal Bank to easily select an appropriate, pre-authored goal. Educators can then dynamically track progress against those goals and analyze reports showing progress for individual students or entire cohorts of ELL students.

Demographics
Schedule
ELP Testing
Accommodations
Modifications
Goals
History

**Rafael C Abuassaf** 1002002462 Kennedy Junior High School

Grade: 8  
Language: Arabic  
LEP Status: ELL

Composite: 3 - Developing  
Listening: 4 - Expanding Speaking: 4 - Expanding  
Reading: 3 - Developing Writing: 3 - Developing  
Literacy: 3 - Developing

Your changes have been saved.

Goals: 2013/2014 - Year + Add Year/Semester

**Demo Video**

[Download the Student Goals manual \(pdf\)](#)

Type	Goal	Progress
Listening	<p><b>3-5 Listening: Level 3 Student moving to Level 4</b>  Student will move from a Level 3 (Developing) to a Level 4 (Expanding) in Listening by demonstrating mastery of the following Can Do Descriptors:</p> <ul style="list-style-type: none"> <li>Follow multi-step oral directions</li> <li>Identify illustrated main ideas from paragraph-level oral discourse</li> <li>Match literal meanings of oral descriptions or oral reading to illustrations</li> <li>Sequence pictures from oral stories, processes, or procedures</li> </ul> <p>[Edit] [Remove]</p>	<div>On track</div> <div>[History]</div>
	<p><b>6-8 Reading: Level 3 Student moving to Level 4</b>  Student will move from a Level 3 (Developing) to a Level 4 (Expanding) by demonstrating mastery of the following Can Do Descriptors:</p> <ul style="list-style-type: none"> <li>Identify topic sentences, main ideas, and details in paragraphs</li> </ul>	

## ELL Student Plans

Ellevation is the only software platform that brings together all the elements of an individualized language plan, which serves as a core instructional roadmap for students. Having all of a student's information in one place gives all stakeholders a common form on which to track progress, helping to ensure that ELLs successfully acquire the language skills they need to access the rigorous content of the classroom. See [Appendix B](#) for an example *ELL Student Plan*.

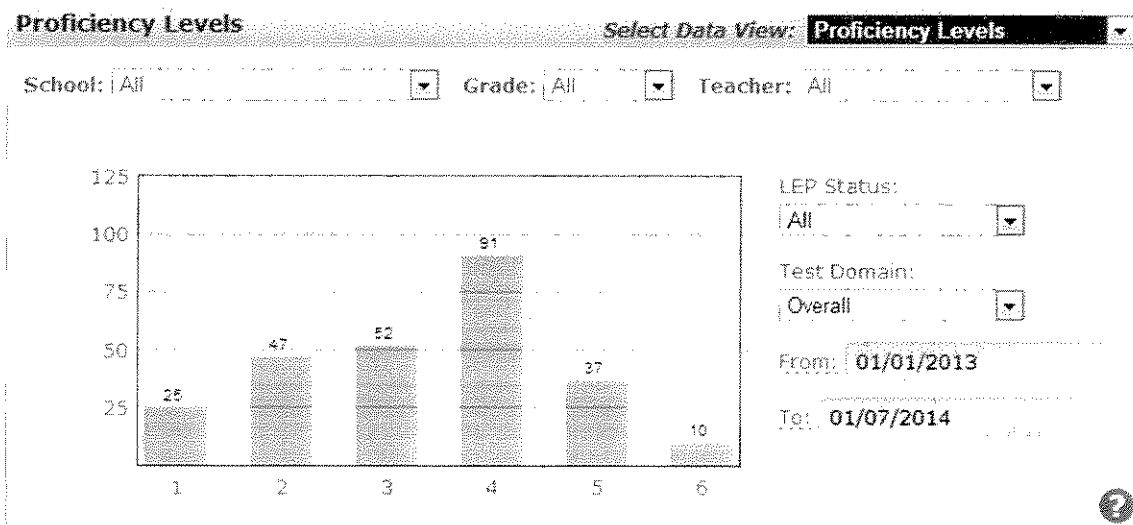
### D. Monitors Student Progress

See Response to *Section II, A*

### E. Allows ESL & General Education teachers to collaborate for each level of ELP

Ellevation improves collaboration between ESL and General Education teachers. One common way in which educators might group their students for instructional purposes is by Proficiency Level. On the Ellevation platform, educators can easily group their students by proficiency level, put instructional plans in place to support standards-based learning according to those proficiency levels, and then track progress over time. Moreover, compared with paper-based filing systems, in which student folders are infrequently updated and difficult to access by teachers at the point of instruction, the Ellevation platform provides significant efficiencies. Teachers can review and collaborate from anywhere, at any time, with updated information.

A simple illustration of how an educator might view their students by Proficiency Level is indicated in the screenshot below. Students are grouped according to their proficiency levels, as indicated by the blue bars. This information is dynamic and updated to reflect progress as student assessment data changes. Our Partner Support Team has often led professional development sessions with site-level principals to discuss strategies for each proficiency level, by school, using this data visual to facilitate conversation



#### F. Allows ESL & General Education teachers to collaborate for each individual student

While summary views of student data can be useful, Ellevation drills down to support the individualized learning needs of the student. As described in Part II, C, the most commonly used report on the Ellevation platform is the *ELL Student Plan*. This core instructional document is usually generated by an ESL teacher, but then shared with classroom teachers and parents so that each stakeholder surrounding the student understands what the student "Can Do," what that student's goals are for the year, and what kinds of testing accommodations and classroom modifications are appropriate based on his/her proficiency level. For many of our district partners across the United States, these *ELL Student Plans* have become a de-facto district requirement because they are so effective at getting everyone "on the same page."

#### G. Translates Title III paperwork into other languages

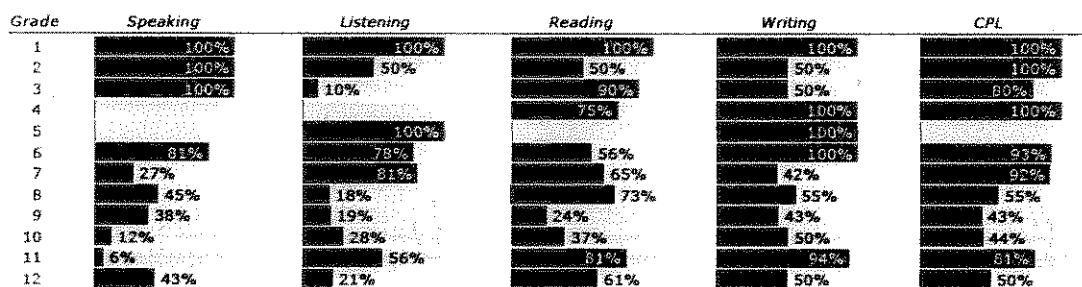




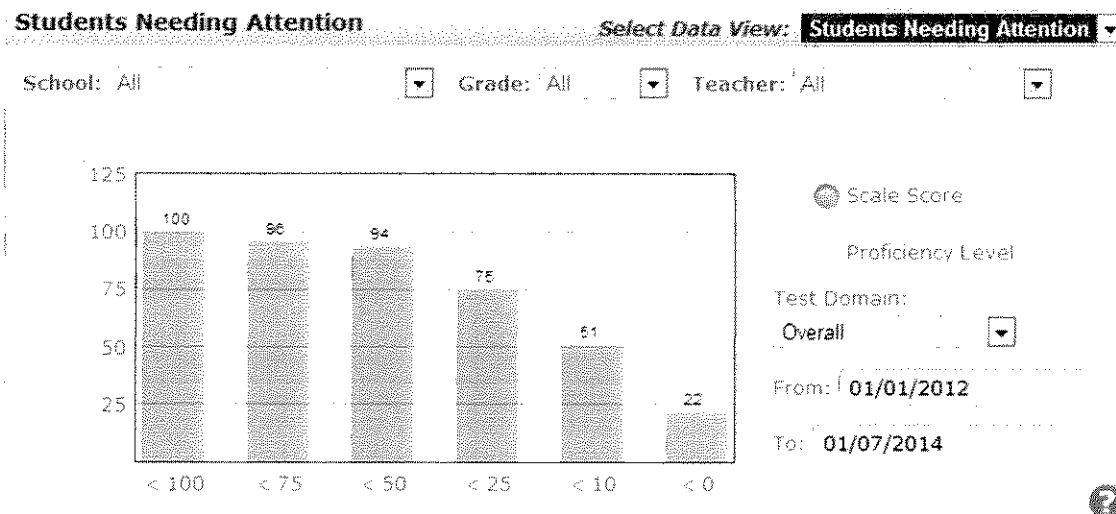
Ellevation users can create a set of federally-required parent letters in order to ensure effective communication with families. These letters are pre-populated with student assessment results (e.g., W-APT, WIDA ACCESS for ELLs), as well as services offered if the student is eligible for the district's ESL program. The letters are periodically updated to reflect federal guidance from the DOJ and OCR so that administrators can be confident about compliance with the law. In addition, the letters are currently translated into 28 different languages, and we routinely translate additional languages at our district partners' request. These certified translations are automatically selected based on the home language preferences documented in the Student Demographic section of Ellevation. See [Appendix C & D](#) for examples.

#### H. Pulls records of students by school/district that are in need of special attention and not meeting AMAOs

Ellevation can help educators and administrators review individual or cohort student performance against AMAOs in a number of different ways. At the macro-level, a district might want to understand what percentage of their students demonstrated language proficiency growth over the past year – and even how that breaks down by grade and domain:



At the student level, a teacher might want to review his or her “Students Needing Attention” dashboard view to review those students that have demonstrated a concerning lack of proficiency growth over time:



In either case, Ellevation gives educators the appropriate information based on the needs of the user, filtered by district, school, teacher or student.



**I. Supports WIDA's ELD standards**

Ellevation supports the proper implementation of WIDA ELD Standards. Indeed, Ellevation has a partnership with WIDA that gives educators a powerful tool combining data, analytics, and ELP standards – all on the same platform.

Ellevation enables convenient entry of W-APT scores for screenings, and allows for automatic uploads of summative ACCESS for ELLs scores from Metritech source files. The Ellevation software platform gives users the tools to set effective language development goals aligned to research-based standards (as discussed in Section C), and also produces WIDA-related reports, including our *ELD Standards Report*:

*WIDA ELD Standards Report:*

Due to a unique relationship with WIDA, Ellevation can produce customized *WIDA ELD Standards Reports* that are individualized for each student, including the following key attributes:

- The report draws on a student's most recent assessment information – an ACCESS for ELLs or W-APT screener, as entered in the Ellevation platform – to graphically show domain proficiency;
- With these scores, educators understand what students “CAN DO” by language domain (i.e., Listening, Speaking, Reading & Writing). CAN DO descriptors are provided by WIDA;
- In addition, classroom teachers can reference example Model Performance Indicators (MPIs), which help content-area teachers understand what students should be able to demonstrate, and what language proficiency goals they should be striving toward.

The *WIDA ELD Standards Report* is unique because it leverages the Ellevation database to create personalized reports incorporating relevant WIDA standards. No other product can marry licensed WIDA content with a student's most recent ELP assessment information to create customized reports that help teachers make instructional decisions. Because Ellevation software was initially conceived in a WIDA state, and most customers are part of the WIDA consortium, the Ellevation team is intently focused on making sure WIDA standards are up-to-date and reflective of the latest research from WIDA. Through a partnership with Ellevation, district administrators can feel confident that they always have the most up-to-date WIDA information. See **Appendix E** for an example *WIDA ELD Standards Report*

**J. Describe briefly the current usage of your program**

Ellevation currently serves nearly 200 school districts in 26 states, including 4 district partners in Wisconsin. The Ellevation platform is used by districts large and small, rural and urban, with significant usage by WIDA partners in particular. Our largest customers have over 25,000 ELL students on the Ellevation platform, and several hundred users; our smallest customers are often rural programs with fewer than 100 ELLs. Ellevation is the only Company of its kind in the United States, which is evident by the rapid growth it has enjoyed in the last 24 months.

**K. How long has your program been in use?**

Seven years. The initial Ellevation prototype was created by an ESL Teacher/Coordinator in North Carolina in 2007. It is now supported by a world-class technology and support team in Boston.

**L. Is training provided for admin and teachers?**



Yes. It is critical to pair software with training and support. To that end, Ellevation will provide significant up-front training and on-going implementation support to ensure that KUSD users are comfortable on the platform, and can begin benefitting from the product immediately.

Ellevation's Partner Support Program is structured to ensure that ESL program data is imported quickly and accurately and that administrators and teachers have the skills and knowledge needed to effectively use the program. Additionally, we provide post-training implementation support to maximize their use of product features in a high-quality way. Our training and implementation support experience is customized to meet each district's specific needs, and includes the following components:

#### *Pre-training Administrative Support*

Pre-training administrative support takes place between the time that a district signs on to work with Ellevation and the in-person training. This phase is designed to introduce the district's ESL coordinator(s) to the tool and to activate the district's account. During this process, we will work closely with district SIS specialists to import student data and, if necessary, establish procedures for data integration.

#### *Training*

Our experienced and knowledgeable trainers, all of whom have ESL teaching experience and an understanding of the needs of ESL programs and students, ensure that the training experience is high-quality and efficient. Ellevation is unique in that our trainers have "walked in the shoes" of our users.

The training will focus on introducing new users to the Ellevation platform and ensuring that, by the end of the training, they will be able to effectively utilize product functionality. Some examples of the functionality and tasks that users will be introduced to during the training include:

- How to generate reports, student plans and parent letters
- Collecting and analyzing data
- Tracking student progress (for ELLs and for exited students)
- Setting modifications and accommodations
- Setting and tracking progress toward student goals.

#### **M. Is it Title III approved?**

Yes. Most Ellevation partner districts use Title III to help fund Ellevation. Ellevation is a supplemental instructional technology solution focused exclusively on ELLs, offering technology and professional development to help educators inform instruction, improve productivity, and enhance collaboration. Title III Part A clearly identifies 7 "allowable" activities for the use of Title III grants. Two of these activities clearly support the purchase of Ellevation:

- Improving the instruction program for limited English proficient children by identifying, acquiring, and upgrading curricula, instruction materials, **educational software**, and assessment procedures.
- Improving the instruction of limited English proficient children by providing for the acquisition or development of **educational technology** or instructional materials; access to, and participation in, **electronic networks for materials, training, and communication**.

*This page intentionally left blank*

**Kenosha Unified School District  
Kenosha, Wisconsin**

**March 25, 2014**

**MIDDLE SCHOOL HONORS**

A request was made at the Curriculum/Program Standing Committee for an update regarding middle school honors. This informational report contains a brief background of middle school honors, the 2013-14 first semester honors distinction and advanced math numbers, key findings from Hanover Research, and information regarding follow-up.

**Background**

**HISTORY OF GRADE 7 AND 8 HONORS COURSES**

**School Year 2010-11 Core Courses Offered**

- Grade 7 Mathematics
- Grade 7 Prealgebra—Honors offering
- Grade 8 Mathematics—Prealgebra
- Grade 8 Algebra I—Honors offering
- Grades 7 and 8 English—Coded honors courses offered at Lance, Mahone, McKinley, and Washington Middle Schools

(Lincoln Middle School did not have a coded honors class but did separate students by performance levels. Bullen Middle School did not offer honors English.)

- No middle school offered honors in science or social studies.

**School Year 2011-12 Core Courses Offered**

- Grade 7 Prealgebra for all students
  - A few students took an advanced math course outside their grade level in their home building (Algebra 1) or at another location (i.e., Kenosha eSchool).
- Grade 8 Mathematics—Prealgebra

- Grade 8 Algebra 1—Honors offering
- Grades 7 and 8 English—Continuance of 2010-11
- No middle school offered honors in science or social studies.

#### School Year 2012-13 Core Courses Offered

- Grade 7 Prealgebra—Offered for all students
- Grade 8 Algebra 1—Offered for all students
- Grades 7 and 8 English—No separate honors sections
- Honors distinction options are now offered in math, English, science, and social studies in grades 7 and 8.

### **Outcome I**

A meeting occurred with all middle school principals, the assistant superintendent of secondary school leadership, and members of Teaching and Learning to address the request noted by the March 12, 2013, Curriculum/Program Standing Committee. The outcomes are provided below.

- Seventh grade math
  - Advanced Prealgebra for seventh grade students
  - Prealgebra for seventh grade students
- Eighth grade math
  - Advanced Algebra for eighth grade students
  - Algebra for eighth grade students
- English/Language arts will remain; no advanced classes will be added for the 2013-14 school year. Students will be heterogeneously grouped.
- Science and social studies will remain; no advanced classes will be added for the 2013-14 school year. Students will be heterogeneously grouped.
- The honors distinction opportunity will continue, and the opportunity for honors distinction will be offered in all the following core classes: science, and social studies, ~~English/language arts, and math.~~

- Grouping of students for advanced math courses will be as follows:
  - Based on the top one-third of each class (seventh and eighth grade) for each middle school
  - If a child is below the designated one-third, every parent has the right to set an appointment with the building administration team to review all necessary data to ensure appropriate placement is considered for the child and may result in placement for the Advanced Prealgebra or Advanced Algebra course.

## **Outcome II**

A follow-up meeting occurred on May 15 and 16, 2013, with all middle school principals, assistant principals, the assistant superintendent of secondary school leadership, and members of Teaching and Learning to address the comments noted by the Curriculum/Program Standing Committee and public on May 14, 2013, at the Curriculum/Program Standing Committee Meeting. The outcomes are provided below.

- Seventh grade math
  - Advanced Prealgebra for seventh grade students
  - Prealgebra for seventh grade students
- Eighth grade math
  - Advanced Algebra for eighth grade students
  - Algebra for eighth grade students
- English/language arts will remain; no advanced classes will be added for the 2013-14 school year. Students will be heterogeneously grouped.
- Science and social studies will remain; no advanced classes will be added for the 2013-14 school year. Students will be heterogeneously grouped.
- The honors distinction opportunity will continue, and the opportunity for honors distinction will be offered in all core classes: science, social studies, English/language arts, and math.
- Parent choice will be exercised to sign up students for any advanced math course in seventh or eighth grade.

## **Semester 1 Data**

- Appendix A—district data (ethnicity/gender), 2013-14 Semester 1 (Quarter 2)
- Appendix B—Bullen Middle School data

- Appendix C—Lance Middle School data
- Appendix D—Lincoln Middle School data
- Appendix E—Mahone Middle School data
- Appendix F—Washington Middle School data

### **Key Findings**

In February 2014 Hanover Research prepared a Gifted Programming for Middle School Students report for the Southeast Wisconsin Schools Alliance. Key findings from that report are as follows:

- **Over the past 30 years, gifted education programs have become the norm at U.S. public schools, with perhaps 75 percent of states mandating that schools provide specialized programming for high ability students.** Recent estimates indicate that approximately 3 million students—or 6 percent of the U.S. kindergarten through twelfth grade student body—are currently enrolled in gifted education programming.
- **Overall, the current base of research is widely supportive of the efficacy of gifted education programs.** Most education researchers and practitioners believe that concerns regarding equitable access to high quality education, student labeling, and the social-emotional development of gifted adolescent learners can be addressed with effective program design and administration.
- **Recent evidence suggests that participation in gifted education programs may not be beneficial for marginally gifted pupils.** Researchers theorize that the recognition of these pupils' abilities in comparison with those of their highly gifted peers may be associated with a decrease in self-esteem and, accordingly, decreased ability to pay attention and maintain interest in school.
- **The three most common designs for middle school gifted education programs are the pull-out/resource room models, the ability grouping model, and the in-class clustering model.** While each of these models has a substantial research-based evidence supporting their efficacy, the selection of the most appropriate model will largely depend on a number of localized contextual factors, including school size, funding arrangements, and the availability of other district resources.
- **Most gifted education experts advocate curriculum differentiation as a means of delivering appropriately challenging context to the entire spectrum of gifted learners.** Effective curriculum differentiation requires the development of flexible curricula and classroom structures that allow for the manipulation of content, pedagogy, and exercises to accommodate intellectual diversity.



- **Middle school gifted programs frequently use accelerated curriculum and curriculum enrichment models to deliver content that is appropriate for the needs to gifted learners.** A review of district-wide gifted program protocols indicates that accelerated curricula are most common in mathematics while curriculum enrichment models are typically employed in the English Language arts.
- **Young adolescence is typically characterized by rapid physical and cognitive development as well as the development of academic interests and intellectual awareness.** In many instances students not identified as gifted in elementary school may begin to exhibit gifted behaviors and capacities in middle school. Accordingly, schools and districts should develop systems that allow for the continuous assessment of students and create flexible groupings so that students can be shifted to more appropriate programming expeditiously if necessary.
- **Gifted education programs must effectively accommodate the social-emotional needs of high ability middle school students.** Several advocacy groups recommend that gifted students should be encouraged to participate in a wide range of athletic and extra-curricular activities and that gifted programming should affirm these students' cognitive capacities while recognizing their need to belong to a peer group.

A copy of the full report can be found in Appendix G.

### **Follow-Up Standing Committee Motion**

~~Based on the feedback and need for middle school gifted and talented students, an investigation into establishing a sixth through eighth grade middle school gifted and talented program will be done. (No changes are recommended in regard to middle school honors.)~~ On Tuesday, March 11, 2014, the Curriculum/Program Committee recommended that the board authorizes exploration of the gifted and talented program; and expansion for grades 6, 7, and 8 be implemented as soon as possible.

The Curriculum/Program Committee further recommended that the board authorize an expansion, at minimum, of the seventh and eighth grade honors English curriculum.

### **Recommendation**

Administration recommends an exploration of a gifted and talented sixth through eighth grade middle school program for the 2015-16 school year.

Administration recommends a seventh and eighth grade honors middle school course. The honors course will have a well-developed curriculum meeting expectations for student growth and learning.

Dr. Joseph Mangi  
Interim Superintendent of Schools

Dr. Sue Savaglio-Jarvis  
Assistant Superintendent of Teaching and Learning

Dr. Bethany Ormseth  
Interim Assistant Superintendent of Secondary School Leadership

**KENOSHA UNIFIED SCHOOL DISTRICT**  
**Middle School Core Subjects and Honors Distinction**  
**by Selected Ethnicities\*, Gender, and All Students**

**SY 2013-14 Quarter 2**

**(District figures include students from Bullen, Lance, Lincoln, Mahone and Washington)**

Grade/Subject	Black			Hispanic			White			Female			Male			All Students		
	Enroll	Honors		Enroll	Honors		Enroll	Honors		Enroll	Honors		Enroll	Honors		Enroll	Honors	
	<u>N</u>	<u>N</u>	<u>%</u>	<u>N</u>	<u>N</u>	<u>%</u>	<u>N</u>	<u>N</u>	<u>%</u>	<u>N</u>	<u>N</u>	<u>%</u>	<u>N</u>	<u>N</u>	<u>%</u>	<u>N</u>	<u>N</u>	<u>%</u>
Grade Level: 7																		
English	232	11	4.7%	415	17	4.1%	729	75	10.3%	717	73	10.2%	733	35	4.8%	1,450	108	7.4%
Math	233	28	12.0%	419	84	20.0%	729	292	40.1%	718	217	30.2%	737	212	28.8%	1,455	429	29.5%
Science	193	3	1.6%	373	6	1.6%	650	61	9.4%	624	43	6.9%	658	32	4.9%	1,282	75	5.9%
Social Studies	206	3	1.5%	384	5	1.3%	709	35	4.9%	674	28	4.2%	696	19	2.7%	1,370	47	3.4%
	<b>864</b>	<b>45</b>	<b>5.2%</b>	<b>1,591</b>	<b>112</b>	<b>7.0%</b>	<b>2,817</b>	<b>463</b>	<b>16.4%</b>	<b>2,733</b>	<b>361</b>	<b>13.2%</b>	<b>2,824</b>	<b>298</b>	<b>10.6%</b>	<b>5,557</b>	<b>659</b>	<b>11.9%</b>
Grade Level: 8																		
English	260	5	1.9%	372	2	0.5%	797	68	8.5%	749	43	5.7%	750	40	5.3%	1,499	83	5.5%
Math	260	33	12.7%	380	85	22.4%	783	358	45.7%	749	241	32.2%	739	255	34.5%	1,488	496	33.3%
Science	241	4	1.7%	351	12	3.4%	762	83	10.9%	713	57	8.0%	709	46	6.5%	1,422	103	7.2%
Social Studies	233	2	0.9%	368	1	0.3%	762	58	7.6%	713	28	3.9%	716	40	5.6%	1,429	68	4.8%
	<b>994</b>	<b>44</b>	<b>4.4%</b>	<b>1,471</b>	<b>100</b>	<b>6.8%</b>	<b>3,104</b>	<b>567</b>	<b>18.3%</b>	<b>2,924</b>	<b>369</b>	<b>12.6%</b>	<b>2,914</b>	<b>381</b>	<b>13.1%</b>	<b>5,838</b>	<b>750</b>	<b>12.8%</b>

\*Ethnic groups with small cell sizes were not reported to protect student confidentiality.

**KENOSHA UNIFIED SCHOOL DISTRICT**  
**Middle School Core Subjects and Honors Distinction**  
**by Selected Ethnicities\*, Gender, and All Students**  
**SY 2013-14 Quarter 2**

**School: Bullen Middle**

Grade/Subject	Black			Hispanic			White			Female			Male			All Students		
	Enroll	Honors		Enroll	Honors		Enroll	Honors		Enroll	Honors		Enroll	Honors		Enroll	Honors	
	<u>N</u>	<u>N</u>	<u>%</u>	<u>N</u>	<u>N</u>	<u>%</u>	<u>N</u>	<u>N</u>	<u>%</u>	<u>N</u>	<u>N</u>	<u>%</u>	<u>N</u>	<u>N</u>	<u>%</u>	<u>N</u>	<u>N</u>	<u>%</u>
Grade Level: 7																		
English	52	0	0.0%	99	0	0.0%	129	1	0.8%	136	0	0.0%	151	1	0.7%	287	1	0.3%
Math	53	7	13.2%	103	27	26.2%	129	65	50.4%	137	50	36.5%	155	53	34.2%	292	103	35.3%
Science	53	0	0.0%	103	0	0.0%	129	8	6.2%	137	5	3.6%	155	3	1.9%	292	8	2.7%
Social Studies	53	0	0.0%	103	0	0.0%	129	0	0.0%	137	0	0.0%	155	0	0.0%	292	0	0.0%
	<b>211</b>	<b>7</b>	<b>3.3%</b>	<b>408</b>	<b>27</b>	<b>6.6%</b>	<b>516</b>	<b>74</b>	<b>14.3%</b>	<b>547</b>	<b>55</b>	<b>10.1%</b>	<b>616</b>	<b>57</b>	<b>9.3%</b>	<b>1,163</b>	<b>112</b>	<b>9.6%</b>
Grade Level: 8																		
English	60	0	0.0%	78	0	0.0%	133	6	4.5%	140	2	1.4%	137	4	2.9%	277	6	2.2%
Math	60	12	20.0%	85	22	25.9%	130	86	66.2%	145	62	42.8%	136	59	43.4%	281	121	43.1%
Science	60	4	6.7%	85	7	8.2%	133	28	21.1%	146	23	15.8%	138	16	11.6%	284	39	13.7%
Social Studies	60	0	0.0%	85	0	0.0%	133	4	3.0%	146	1	0.7%	138	3	2.2%	284	4	1.4%
	<b>240</b>	<b>16</b>	<b>6.7%</b>	<b>333</b>	<b>29</b>	<b>8.7%</b>	<b>529</b>	<b>124</b>	<b>23.4%</b>	<b>577</b>	<b>88</b>	<b>15.3%</b>	<b>549</b>	<b>82</b>	<b>14.9%</b>	<b>1,126</b>	<b>170</b>	<b>15.1%</b>

\*Ethnic groups with small cell sizes were not reported to protect student confidentiality.

**KENOSHA UNIFIED SCHOOL DISTRICT**  
**Middle School Core Subjects and Honors Distinction**  
**by Selected Ethnicities\*, Gender, and All Students**  
**SY 2013-14 Quarter 2**

**School: Lance Middle**

Grade/Subject	Black			Hispanic			White			Female			Male			All Students		
	Enroll	Honors		Enroll	Honors		Enroll	Honors		Enroll	Honors		Enroll	Honors		Enroll	Honors	
	<u>N</u>	<u>N</u>	<u>%</u>	<u>N</u>	<u>N</u>	<u>%</u>	<u>N</u>	<u>N</u>	<u>%</u>	<u>N</u>	<u>N</u>	<u>%</u>	<u>N</u>	<u>N</u>	<u>%</u>	<u>N</u>	<u>N</u>	<u>%</u>
Grade Level: 7																		
English	21	3	14.3%	72	0	0.0%	228	46	20.2%	169	42	24.9%	173	10	5.8%	342	52	15.2%
Math	21	3	14.3%	72	8	11.1%	228	74	32.5%	169	47	27.8%	173	41	23.7%	342	88	25.7%
Science	21	3	14.3%	72	4	5.6%	228	46	20.2%	169	33	19.5%	173	24	13.9%	342	57	16.7%
Social Studies	21	2	9.5%	72	1	1.4%	226	27	11.9%	168	21	12.5%	172	11	6.4%	340	32	9.4%
	<b>84</b>	<b>11</b>	<b>13.1%</b>	<b>288</b>	<b>13</b>	<b>4.5%</b>	<b>910</b>	<b>193</b>	<b>21.2%</b>	<b>675</b>	<b>143</b>	<b>21.2%</b>	<b>691</b>	<b>86</b>	<b>12.4%</b>	<b>1,366</b>	<b>229</b>	<b>16.8%</b>
Grade Level: 8																		
English	21	4	19.0%	57	2	3.5%	238	50	21.0%	162	35	21.6%	176	25	14.2%	338	60	17.8%
Math	21	0	0.0%	57	5	8.8%	234	86	36.8%	161	43	26.7%	171	52	30.4%	332	95	28.6%
Science	21	0	0.0%	57	4	7.0%	238	33	13.9%	162	19	11.7%	176	21	11.9%	338	40	11.8%
Social Studies	21	0	0.0%	57	1	1.8%	238	43	18.1%	162	19	11.7%	176	30	17.0%	338	49	14.5%
	<b>84</b>	<b>4</b>	<b>4.8%</b>	<b>228</b>	<b>12</b>	<b>5.3%</b>	<b>948</b>	<b>212</b>	<b>22.4%</b>	<b>647</b>	<b>116</b>	<b>17.9%</b>	<b>699</b>	<b>128</b>	<b>18.3%</b>	<b>1,346</b>	<b>244</b>	<b>18.1%</b>

\*Ethnic groups with small cell sizes were not reported to protect student confidentiality.

**KENOSHA UNIFIED SCHOOL DISTRICT**  
**Middle School Core Subjects and Honors Distinction**  
**by Selected Ethnicities\*, Gender, and All Students**  
**SY 2013-14 Quarter 2**

**School: Lincoln Middle**

Grade/Subject	Black			Hispanic			White			Female			Male			All Students		
	Enroll	Honors		Enroll	Honors		Enroll	Honors		Enroll	Honors		Enroll	Honors		Enroll	Honors	
	<u>N</u>	<u>N</u>	<u>%</u>	<u>N</u>	<u>N</u>	<u>%</u>	<u>N</u>	<u>N</u>	<u>%</u>	<u>N</u>	<u>N</u>	<u>%</u>	<u>N</u>	<u>N</u>	<u>%</u>	<u>N</u>	<u>N</u>	<u>%</u>
Grade Level: 7																		
English	69	8	11.6%	81	17	21.0%	98	28	28.6%	137	30	21.9%	122	24	19.7%	259	54	20.8%
Math	69	8	11.6%	81	12	14.8%	98	38	38.8%	137	33	24.1%	122	28	23.0%	259	61	23.6%
Science	28	0	0.0%	35	0	0.0%	19	0	0.0%	43	0	0.0%	42	0	0.0%	85	0	0.0%
Social Studies	41	1	2.4%	46	0	0.0%	79	6	7.6%	94	3	3.2%	80	5	6.3%	174	8	4.6%
	<b>207</b>	<b>17</b>	<b>8.2%</b>	<b>243</b>	<b>29</b>	<b>11.9%</b>	<b>294</b>	<b>72</b>	<b>24.5%</b>	<b>411</b>	<b>66</b>	<b>16.1%</b>	<b>366</b>	<b>57</b>	<b>15.6%</b>	<b>777</b>	<b>123</b>	<b>15.8%</b>
Grade Level: 8																		
English	68	0	0.0%	88	0	0.0%	110	4	3.6%	145	1	0.7%	130	3	2.3%	275	4	1.5%
Math	68	9	13.2%	89	20	22.5%	110	60	54.5%	145	42	29.0%	131	51	38.9%	276	93	33.7%
Science	49	0	0.0%	60	0	0.0%	75	0	0.0%	103	0	0.0%	88	0	0.0%	191	0	0.0%
Social Studies	41	0	0.0%	77	0	0.0%	75	2	2.7%	103	0	0.0%	95	2	2.1%	198	2	1.0%
	<b>226</b>	<b>9</b>	<b>4.0%</b>	<b>314</b>	<b>20</b>	<b>6.4%</b>	<b>370</b>	<b>66</b>	<b>17.8%</b>	<b>496</b>	<b>43</b>	<b>8.7%</b>	<b>444</b>	<b>56</b>	<b>12.6%</b>	<b>940</b>	<b>99</b>	<b>10.5%</b>

\*Ethnic groups with small cell sizes were not reported to protect student confidentiality.

**KENOSHA UNIFIED SCHOOL DISTRICT**  
**Middle School Core Subjects and Honors Distinction**  
**by Selected Ethnicities\*, Gender, and All Students**  
**SY 2013-14 Quarter 2**

**School: Mahone Middle**

Grade/Subject	Black			Hispanic			White			Female			Male			All Students		
	Enroll	Honors		Enroll	Honors		Enroll	Honors		Enroll	Honors		Enroll	Honors		Enroll	Honors	
	<u>N</u>	<u>N</u>	<u>%</u>	<u>N</u>	<u>N</u>	<u>%</u>	<u>N</u>	<u>N</u>	<u>%</u>	<u>N</u>	<u>N</u>	<u>%</u>	<u>N</u>	<u>N</u>	<u>%</u>	<u>N</u>	<u>N</u>	<u>%</u>
Grade Level: 7																		
English	45	0	0.0%	94	0	0.0%	209	0	0.0%	174	1	0.6%	202	0	0.0%	376	1	0.3%
Math	45	3	6.7%	94	11	11.7%	209	83	39.7%	174	47	27.0%	202	61	30.2%	376	108	28.7%
Science	46	0	0.0%	94	2	2.1%	210	6	2.9%	174	4	2.3%	204	5	2.5%	378	9	2.4%
Social Studies	46	0	0.0%	94	1	1.1%	210	1	0.5%	174	2	1.1%	204	1	0.5%	378	3	0.8%
	<b>182</b>	<b>3</b>	<b>1.6%</b>	<b>376</b>	<b>14</b>	<b>3.7%</b>	<b>838</b>	<b>90</b>	<b>10.7%</b>	<b>696</b>	<b>54</b>	<b>7.8%</b>	<b>812</b>	<b>67</b>	<b>8.3%</b>	<b>1,508</b>	<b>121</b>	<b>8.0%</b>
Grade Level: 8																		
English	55	1	1.8%	83	0	0.0%	231	8	3.5%	194	5	2.6%	201	8	4.0%	395	13	3.3%
Math	55	4	7.3%	83	12	14.5%	227	78	34.4%	191	50	26.2%	197	53	26.9%	388	103	26.5%
Science	55	0	0.0%	83	1	1.2%	231	22	9.5%	194	15	7.7%	201	9	4.5%	395	24	6.1%
Social Studies	55	1	1.8%	83	0	0.0%	231	8	3.5%	194	5	2.6%	201	5	2.5%	395	10	2.5%
	<b>220</b>	<b>6</b>	<b>2.7%</b>	<b>332</b>	<b>13</b>	<b>3.9%</b>	<b>920</b>	<b>116</b>	<b>12.6%</b>	<b>773</b>	<b>75</b>	<b>9.7%</b>	<b>800</b>	<b>75</b>	<b>9.4%</b>	<b>1,573</b>	<b>150</b>	<b>9.5%</b>

\*Ethnic groups with small cell sizes were not reported to protect student confidentiality.

**KENOSHA UNIFIED SCHOOL DISTRICT**  
**Middle School Core Subjects and Honors Distinction**  
**by Selected Ethnicities\*, Gender, and All Students**  
**SY 2013-14 Quarter 2**

**School: Washington Middle**

Grade/Subject	Black			Hispanic			White			Female			Male			All Students		
	Enroll	Honors		Enroll	Honors		Enroll	Honors		Enroll	Honors		Enroll	Honors		Enroll	Honors	
	<u>N</u>	<u>N</u>	<u>%</u>	<u>N</u>	<u>N</u>	<u>%</u>	<u>N</u>	<u>N</u>	<u>%</u>	<u>N</u>	<u>N</u>	<u>%</u>	<u>N</u>	<u>N</u>	<u>%</u>	<u>N</u>	<u>N</u>	<u>%</u>
Grade Level: 7																		
English	45	0	0.0%	69	0	0.0%	65	0	0.0%	101	0	0.0%	85	0	0.0%	186	0	0.0%
Math	45	7	15.6%	69	26	37.7%	65	32	49.2%	101	40	39.6%	85	29	34.1%	186	69	37.1%
Science	45	0	0.0%	69	0	0.0%	64	1	1.6%	101	1	1.0%	84	0	0.0%	185	1	0.5%
Social Studies	45	0	0.0%	69	3	4.3%	65	1	1.5%	101	2	2.0%	85	2	2.4%	186	4	2.2%
	<b>180</b>	<b>7</b>	<b>3.9%</b>	<b>276</b>	<b>29</b>	<b>10.5%</b>	<b>259</b>	<b>34</b>	<b>13.1%</b>	<b>404</b>	<b>43</b>	<b>10.6%</b>	<b>339</b>	<b>31</b>	<b>9.1%</b>	<b>743</b>	<b>74</b>	<b>10.0%</b>
Grade Level: 8																		
English	56	0	0.0%	66	0	0.0%	85	0	0.0%	108	0	0.0%	106	0	0.0%	214	0	0.0%
Math	56	8	14.3%	66	26	39.4%	82	48	58.5%	107	44	41.1%	104	40	38.5%	211	84	39.8%
Science	56	0	0.0%	66	0	0.0%	85	0	0.0%	108	0	0.0%	106	0	0.0%	214	0	0.0%
Social Studies	56	1	1.8%	66	0	0.0%	85	1	1.2%	108	3	2.8%	106	0	0.0%	214	3	1.4%
	<b>224</b>	<b>9</b>	<b>4.0%</b>	<b>264</b>	<b>26</b>	<b>9.8%</b>	<b>337</b>	<b>49</b>	<b>14.5%</b>	<b>431</b>	<b>47</b>	<b>10.9%</b>	<b>422</b>	<b>40</b>	<b>9.5%</b>	<b>853</b>	<b>87</b>	<b>10.2%</b>

\*Ethnic groups with small cell sizes were not reported to protect student confidentiality.



# Gifted Programming for Middle School Students

Prepared for Southeast Wisconsin Schools Alliance

February 2014



In the following report, Hanover Research discusses the critical considerations in developing and implementing gifted education programming for the middle grades. This report includes a review of pertinent literature related to gifted education theory, presents common grouping and curricular models, and examines research-based best practices in the identification of gifted students and the administration of specialized education programs. The report concludes with profiles of three school districts that have implemented successful gifted education programs at the middle school level.

# TABLE OF CONTENTS

<b>Executive Summary and Key Findings .....</b>	<b>4</b>
INTRODUCTION .....	4
KEY FINDINGS .....	4
<b>Section I: Gifted Education – Theory and Practice .....</b>	<b>6</b>
DEFINING GIFTED CHILDREN AND EDUCATION .....	6
THE EVOLUTION OF GIFTED EDUCATION .....	7
EFFICACY OF GIFTED EDUCATION PROGRAMS .....	8
<b>Section II: Gifted Education in Middle School .....</b>	<b>10</b>
GIFTED EDUCATION PROGRAM MODELS .....	10
Pull-Out/Resource Room Models .....	11
Homogeneous/Ability Grouping .....	12
In-Class Clustering .....	13
CURRICULAR AND INSTRUCTIONAL MODELS .....	15
Differentiation .....	16
Curriculum Acceleration .....	17
Curriculum Enrichment .....	18
IDENTIFICATION AND ASSESSMENT .....	19
Intelligence Tests .....	20
ADMINISTRATION OF GIFTED EDUCATION PROGRAMS .....	21
Planning Middle School Gifted Education Programs .....	21
Staffing and Professional Development .....	22
Meeting the Affective and Emotional Needs of Gifted Middle Schoolers .....	23
<b>Section III: Profiles .....</b>	<b>25</b>
CHAPEL HILL – CARRBORO CITY SCHOOLS .....	25
Identification and Assessment .....	25
Gifted and Highly Gifted Education .....	26
Learning Environment for Advanced Programming .....	27
SCOTTSDALE UNIFIED SCHOOL DISTRICT .....	27
Identification and Assessment .....	27
The Comprehensive Gifted Program .....	28
Middle School Gifted Programming .....	28

VIRGINIA BEACH PUBLIC SCHOOLS .....29

    Identification and Assessment.....30

    Full-Time Gifted Education Program .....30

    Clustered Gifted Education Programs .....30

# EXECUTIVE SUMMARY AND KEY FINDINGS

## INTRODUCTION

In this report, Hanover Research discusses critical considerations in developing and implementing gifted education programming for the middle grades. This report includes a review of pertinent literature related to gifted education theory, presents common grouping and curricular models, and investigates research-based best practices in the identification of gifted students and the administration of specialized education programs. The report concludes with profiles of three school districts that have implemented successful gifted education programs at the middle school level. Accordingly, this report comprises the following three sections:

- **Section I: Gifted Education – Theory and Practice** presents a working definition of gifted education and provides context for the importance of fostering the development of high-ability learners by examining the history of gifted education in the United States. This section concludes with a discussion of research-based evidence regarding the efficacy and importance of gifted education.
- **Section II: Gifted Education in Middle School** explores the most common grouping and curricular models in middle school gifted and talented education. This section also provides a discussion of best practices in the identification and assessment of high-ability learners, and outlines important considerations in the development and administration of a middle school gifted education program.
- **Section III: Profiles** presents information related to successful middle school gifted education programs at three school districts: Chapel Hill – Carrboro City Schools in North Carolina, Scottsdale Unified School District in Arizona, and Virginia Beach Public Schools in Virginia.

## KEY FINDINGS

- **Over the past 30 years, gifted education programs have become the norm at U.S. public schools, with perhaps 75 percent of states mandating that schools provide specialized programming for high-ability students.** Recent estimates indicate that approximately 3 million students – or 6 percent of the U.S. K-12 student body – are currently enrolled in gifted education programming.
- **Overall, the current base of research is widely supportive of the efficacy of gifted education programs.** Most education researchers and practitioners believe that concerns regarding equitable access to high-quality education, student labelling, and the social-emotional development of gifted adolescent learners can be addressed with effective program design and administration.

- **Recent evidence suggests that participation in gifted education programs may not be beneficial for marginally gifted pupils.** Researchers theorize that the recognition of these pupils' abilities in comparison with those of their highly gifted peers may be associated with a decrease in self-esteem and, accordingly, decreased ability to pay attention and maintain interest in school.
- **The three most common designs for middle school gifted education program are the pull-out/resource room model, the ability grouping model, and the in-class clustering model.** While each of these models has a substantial research-based evidence supporting their efficacy, the selection of the most appropriate model will largely depend on a number of localized contextual factors, including school size, funding arrangements, and the availability of other district resources.
- **Most gifted education experts advocate curriculum differentiation as a means of delivering appropriately challenging content to the entire spectrum of gifted learners.** Effective curriculum differentiation requires the development of flexible curricula and classroom structures that allow for the manipulation of content, pedagogy, and exercises to accommodate intellectual diversity.
- **Middle school gifted programs frequently use accelerated curriculum and curriculum enrichment models to deliver content that is appropriate for the needs of gifted learners.** A review of district-wide gifted program protocols indicates that accelerated curricula are most common in mathematics, while curriculum enrichment models are typically employed in the English language arts.
- **Young adolescence is typically characterized by rapid physical and cognitive development, as well as the development of academic interests and intellectual awareness.** In many instances, students not identified as gifted in elementary school may begin to exhibit gifted behaviors and capacities in middle school. Accordingly, schools and districts should develop systems that allow for the continuous assessment of students, and create flexible groupings so that students can be shifted to more appropriate programming expeditiously, if necessary.
- **Gifted education programs must effectively accommodate the social-emotional needs of high-ability middle school students.** Several advocacy groups recommend that gifted students should be encouraged to participate in a wide-range of athletic and extra-curricular activities and that gifted programming should affirm these students' cognitive capacities while recognizing their need to belong to a peer group.

## SECTION I: GIFTED EDUCATION – THEORY AND PRACTICE

In this section, Hanover Research provides a generalized overview of K-12 gifted education in the United States. This section begins by establishing consistent definitions of terms, then provides a brief history of the gifted education movement, and finally cites research-based evidence related to the efficacy of gifted education.

### DEFINING GIFTED CHILDREN AND EDUCATION

In 1969, the U.S. Department of Education commissioned a comprehensive study to determine the effect of contemporary education reforms on the achievement of gifted students in the U.S. K-12 education system. Completed in 1972, the resulting *Marland Report to Congress* contained a definition of “giftedness” that would ultimately form the basis of most federal, state, and district-level conceptions of the term over the next 40 years.<sup>1</sup> This definition states that gifted and talented children “...are those identified by professionally qualified persons who, by virtue of outstanding abilities, are capable of high performance.”<sup>2</sup> Perhaps most importantly, the ***Marland Report* shifted the scope of giftedness beyond the realm of intellectual capacity, by specifically addressing exceptionally creative thinking, leadership ability, visual and performing arts, and psychomotor ability as criteria in the identification of giftedness.**<sup>3</sup>

The National Association for Gifted Children (NAGC) provides further specificity to the discussion of giftedness, stating that “...[g]ifted individuals are those who demonstrate outstanding levels of aptitude (defined as an exceptional ability to reason and learn) or competence (documented performance or achievement in top 10 percent or rarer) in one or more domains.”<sup>4</sup> Building largely upon the Marland definition, NAGC notes that these domains may include any activity or discipline containing its own unique system of symbols, such as mathematics, music, and language, or those requiring sensorimotor performance, such as painting, dance, and athletics.<sup>5</sup>

<sup>1</sup> Reis, S. “Major Turing Points in Gifted Education in the 20<sup>th</sup> Century.” Neag Center for Gifted Education and Talent Development at the University of Connecticut.

[http://www.gifted.uconn.edu/general/faculty/reis/Major\\_Turning\\_Points.html](http://www.gifted.uconn.edu/general/faculty/reis/Major_Turning_Points.html)

<sup>2</sup> Marland, S.P. “Education of the Gifted and Talented – Volume I: Report to the Congress of the United State by the U.S. Commissioner of Education.” United States Department of Health, Education, and Welfare. August 1971, p. ix. <http://files.eric.ed.gov/fulltext/ED056243.pdf>

<sup>3</sup> Ibid.

<sup>4</sup> “What is Giftedness?” National Association for Gifted Children. <http://www.nagc.org/WhatisGiftedness.aspx>

<sup>5</sup> Ibid.

## THE EVOLUTION OF GIFTED EDUCATION

Though not formally addressed in federal policy until the late 1960s, the practice of developing differentiated education for exceptional children had been widely employed in K-12 education for nearly a century.<sup>6</sup> In 1868, public schools in St. Louis began the first documented effort to identify and educate gifted learners, a practice that was gradually propagated through other urban school districts and became relatively common by the 1920s.<sup>7</sup> The launch of the Soviet satellite Sputnik 1 in 1957 renewed calls for the nation's education system to foster exceptional aptitude, especially in mathematics and the sciences.<sup>8</sup>

However, early gifted education programs tended to be relatively narrow in scope, focusing on only intellectual capacity and using traditional pedagogical techniques to deliver an accelerated curriculum.<sup>9</sup> A 1988 Act of Congress created the *Jacob Javits Gifted and Talented Students Education Program*, funding a series of scientific research initiatives and pilot projects to "...build and enhance the ability of elementary and secondary schools to meet the special education needs of gifted and talented students."<sup>10</sup> Notably, the passage of the Javits Act resulted in the formation of the National Research Center on the Gifted and Talented (NRC/GT), and placed a national priority on expanding gifted education opportunities to traditionally underserved and underrepresented students, substantially increasing the reach of gifted education across the United States.<sup>11</sup>

While no federal agency or private organization appears to track the prevalence of gifted and talented education programs at individual grade levels, recent evidence from the NAGC suggests that gifted student programs and policies have become the norm.<sup>12</sup> For instance, a 2012 survey of state departments of education found that, of 43 responding states, 32 mandate the availability of gifted and talented education in public schools, with roughly 75 percent of these regulating the means by which gifted students are identified and assessed.<sup>13</sup> Overall, the NAGC estimates that **roughly 3 million K-12 students are currently**

<sup>6</sup> "The History of Gifted and Talented Education." National Association for Gifted Children.

<http://www.nagc.org/index.aspx?id=607>

<sup>7</sup> [1] Ibid.

[2] Hearne, J. and Maurer, B. "Gifted Education: A Primer." New Horizons for Learning.

[http://education.jhu.edu/PD/newhorizons/Exceptional%20Learners/Gifted%20Learners/Articles%20-%20Gifted%20Learners/gifted\\_education\\_a\\_primer.htm](http://education.jhu.edu/PD/newhorizons/Exceptional%20Learners/Gifted%20Learners/Articles%20-%20Gifted%20Learners/gifted_education_a_primer.htm)

<sup>8</sup> "The History of Gifted and Talented Education." National Association for Gifted Children. Op cit.

<sup>9</sup> ] Hearne, J. and Maurer, B. "Gifted Education: A Primer." Op cit.

<sup>10</sup> "Jacob K. Javits Gifted and Talented Students Education Program." United States Department of Education.

<http://www2.ed.gov/programs/javits/index.html>

<sup>11</sup> "Jacob Javits Gifted and Talented Education Action." National Association for Gifted Children.

<sup>12</sup> "2012-2013 State of the Nation in Gifted Education." National Association for Gifted Children. 2013.

[http://www.nagc.org/uploadedFiles/Gifted\\_by\\_State/state\\_of\\_states\\_2012-13/4082%20NAGC%20State%20of%20the%20Nation%202013-5.pdf](http://www.nagc.org/uploadedFiles/Gifted_by_State/state_of_states_2012-13/4082%20NAGC%20State%20of%20the%20Nation%202013-5.pdf)

<sup>13</sup> "Table C: State Mandates and Funding Levels." National Association for Gifted Children. 2013.

[http://www.nagc.org/uploadedFiles/Gifted\\_by\\_State/state\\_of\\_states\\_2012-13/Table%20C%20\(mandates%20%20funding\).pdf](http://www.nagc.org/uploadedFiles/Gifted_by_State/state_of_states_2012-13/Table%20C%20(mandates%20%20funding).pdf)

enrolled in gifted education programs, accounting for approximately 6 percent of the U.S. student body.<sup>14</sup>

## EFFICACY OF GIFTED EDUCATION PROGRAMS

Likely a result of the heated debate surrounding gifted education in U.S. schools, the existing base of literature is populated by scientific studies investigating the efficacy of specialized education programs for high-ability learners. A variety of special interest groups, including the NAGC and the National Society for the Gifted and Talented (NGST), have firmly advocated for the expansion of educational opportunities that meet the needs of gifted students, insisting that such programs are beneficial to these students, the schools, and more broadly, to society as a whole.<sup>15</sup> By and large, the base of scientific evidence supports such claims.

*“Distinct ability patterns” are generally identifiable by age 13, lending credence to the notion that these gifted students should be supported during the middle grades.*

Highlighting the importance of gifted education in the middle grades, a 2007 study conducted by researchers at Vanderbilt University followed the lives and careers of some 2,400 individuals who scored in the 99<sup>th</sup> percentile on standardized aptitude tests at an early age. Results of this ten-year analysis showed that “distinct ability patterns” that are associated with future creativity in the arts and sciences are generally apparent by the age 13, supporting the notion that students who display significant ability at an early age should be nurtured and fostered in the middle grades.<sup>16</sup> However, it is important to note that effective instructional strategies for gifted students may differ somewhat from effective instructional techniques more generally. For instance, a study conducted by the NRC/GT found that most teachers tasked with delivering educational content to gifted youth were not adequately trained in pedagogical techniques required to successfully instruct highly gifted students.<sup>17</sup>

The base of research also suggests that, when high-ability students have access to and participate in gifted education programs, they generally experience substantial developmental and cognitive gains that may persist at least throughout schooling. One long-term evaluation of more than 300 gifted youths who had participated in gifted education found that these individuals were over 50 times more likely to earn a doctoral degree

<sup>14</sup> “Frequently Asked Questions.” National Center for Gifted Children. <http://www.nagc.org/index2.aspx?id=548>

<sup>15</sup> “Advanced Students in Today’s Classrooms: What Do We Know?” National Association for Gifted Children. [http://www.nagc.org/uploadedFiles/Information\\_and\\_Resources/Fact\\_Sheets/GT%20in%20the%20classroom%20what%20do%20we%20know.pdf](http://www.nagc.org/uploadedFiles/Information_and_Resources/Fact_Sheets/GT%20in%20the%20classroom%20what%20do%20we%20know.pdf)

<sup>16</sup> Park, G. Lubinski, D., and Benbow, C. “Contrasting Intellectual Patterns Predict Creativity in the Arts and Sciences.” *Psychological Science*. 18:11. 2007, p. 948. <https://my.vanderbilt.edu/smpy/files/2013/02/ParkPsychScience2007.pdf>

<sup>17</sup> Archambault, F., Westberg, K., Brown, S., Hallmark, B., Emmons, C., & Zhang, W. “Regular Classroom Practices with Gifted Students: results of a National Survey of Classroom Teachers.” The National Research Center on the Gifted and Talented. 2003. <http://www.gifted.uconn.edu/nrcgt/archwest.html>



compared to the established base rate.<sup>18</sup> Similarly, a research-based study cited by the NAGC notes that gifted education programs have substantial impacts on students' subsequent academic interests and plans to pursue post-secondary education.<sup>19</sup>

However, a recent study evaluating longitudinal student data found less positive results for marginally gifted students.<sup>20</sup> Comparing the academic performance of some 2,600 students who either barely qualified for or narrowly missed the cutoff for gifted education programs in a large school district, researchers found no discernible difference between students in gifted and general education programs.<sup>21</sup> Though the root cause of these findings is not necessarily understood, the researchers theorize that it may be related to a difference of "self-concept" between the two student groups: marginally gifted students in gifted education programs may become discouraged with their own progress compared to that of their high-achieving peers, negatively affecting their ability to concentrate and effectively learn.<sup>22</sup>

Similarly, a series of scientific analyses has shown a **trend of poor outcomes for gifted students lacking adequate support from gifted and talented education programs**. A 1991 study by Joseph Renzulli and Sunghee Park at the University of Connecticut found that between 18 and 25 percent of all gifted students prematurely withdraw from secondary education, and that, in 1983, nearly 20 percent of all high school dropouts at U.S. public schools were classified as gifted.<sup>23</sup> A subsequent study found that gifted dropouts were more likely to come from depressed socio-economic families and minority backgrounds, as well as to have parents with low levels of education.<sup>24</sup> These studies shed light on the importance of ensuring that gifted students are adequately supported.

<sup>18</sup> Lubinski, D., Webb, R., Morelock, M., and Benbow, C. "Top 1 in 10,000: A 10-Year Follow-Up of the Profoundly Gifted." Cited in: "Acceleration: What the Research Says." National Association for Gifted Children. <http://www.nagc.org/index.aspx?id=3412>

<sup>19</sup> "Gifted Education Strategies: What the Research Says." National Association for Gifted Children. <http://www.nagc.org/index.aspx?id=3412>

<sup>20</sup> Shea, C. "Do 'Gifted' Programs Work?" The Wall Street Journal. June 2, 2011. <http://blogs.wsj.com/ideas-market/2011/06/02/do-gifted-programs-work/>

<sup>21</sup> Bui, S., Craig, S. and Imberman, S. "Is Gifted Education a Bright Idea? Assessing the Impact of Gifted and Talented Programs on Achievement and Behavior." The National Bureau of Economic Research. 2011, p. 11. <http://www.uh.edu/~scraig2/BuiCraigImbermanLotteryDraft.pdf>

<sup>22</sup> [1] Bui, S. et al. "Is Gifted Education a Bright Idea? Assessing the Impact of Gifted and Talented Programs on Achievement and Behavior." Op cit. p. 4.

[2] Barkhorn, E. "Do Gifted Programs Improve Learning?" The Atlantic. December 19, 2013.

<http://www.theatlantic.com/education/archive/2013/12/do-gifted-programs-improve-learning/282532/>

<sup>23</sup> Renzulli, J., and Park, S. "Gifted Dropouts: The Who and The Why." Gifted Child Quarterly. 44:4. 2000, p. 261. [http://www.nagc.org/uploadedFiles/PDF/Advocacy\\_PDFs/dropout%20\(GCQ%2044\(4\)\).pdf](http://www.nagc.org/uploadedFiles/PDF/Advocacy_PDFs/dropout%20(GCQ%2044(4)).pdf)

<sup>24</sup> Renzulli, J., and Park, S. "Giftedness and High School Dropouts: Personal, Family, and School-related Factors." The National Research Center on the Gifted and Talented. 2002, p. xiv. [http://www.nagc.org/uploadedFiles/PDF/Advocacy\\_PDFs/dropouts%20\(NRC\).pdf](http://www.nagc.org/uploadedFiles/PDF/Advocacy_PDFs/dropouts%20(NRC).pdf)

## SECTION II: GIFTED EDUCATION IN MIDDLE SCHOOL

In this section, Hanover Research provides details related to the design and administration of gifted education programs for the middle grades. The section begins with a discussion of three common gifted education models, followed by important considerations in the development of appropriate curriculum and instructional techniques. This section concludes with an overview of basic student assessment methodologies and best practices in the administration of gifted education programming.

### GIFTED EDUCATION PROGRAM MODELS

The model selected for a gifted education program is largely dependent on a number of localized contextual factors, including district size, the number of students involved in the program, and the availability of funding.<sup>25</sup> While full-time gifted education models – such as those offered in magnet schools – may be appropriate for large urban districts, funding arrangements often preclude the formation of such models in smaller school districts.<sup>26</sup> Accordingly, this subsection primarily focuses on three part-time gifted education models that are thought to be most appropriate for middle schools in small and mid-sized school districts (Figure 2.1). In general, research-based evidence supports each of the models discussed in this subsection; however, experts agree that each model's efficacy is likely to vary depending on student characteristics, program implementation, and the local context.<sup>27</sup>

**Figure 2.1: Prevalence of Program Types by School Level**

PROGRAM TYPE	PREVALENCE OF PROGRAM TYPE		
	ELEMENTARY SCHOOL	MIDDLE SCHOOL	HIGH SCHOOL
Pull-Out/Resource Room	48%	32%	17%
In-Class Clustering	36%	37%	30%
Homogeneous/Ability Grouping	7%	20%	28%
Summer or Weekend Program	6%	5%	6%

Source: National Research Center on the Gifted and Talented<sup>28</sup>

Note: Due to the relative rarity and financially intensive nature of summer and weekend programs, this model is not discussed further in this report.

<sup>25</sup> [1] "Program Delivery Models for the Gifted." Digest of Gifted Research ,Duke University. <http://tip.duke.edu/node/725>

[2] "NAGC Position Paper: Grouping." National Association for Gifted Children. <http://www.nagc.org/index.aspx?id=4450>

<sup>26</sup> "Magnet Schools." Encyclopedia of Children and Childhood in History and Society. <http://www.faqs.org/childhood/Ke-Me/Magnet-Schools.html>

<sup>27</sup> "Program Delivery Models for the Gifted." Digest of Gifted Research ,Duke University. Op cit.

<sup>28</sup> Ibid.

### *PULL-OUT/RESOURCE ROOM MODELS*

The second-most common model employed at the middle school level, the pull-out/resource room model generally involves removing gifted students from their classroom for several hours each week for the delivery of more specialized group instruction.<sup>29</sup> During resource room instruction, **students may engage in subject-specific enrichment of the grade-level curriculum, targeted content unrelated to the classroom education, or more generalized exercises related to critical thinking or problem solving.**<sup>30</sup> The NAGC advises that resource rooms should be staffed by gifted education specialists, potentially increasing programming costs compared to other in-class models.<sup>31</sup>

Proponents of the pull-out system generally note that the model allows gifted students to spend the majority of structured school time in the general education classroom, **creating the heterogeneous student groupings that are thought to benefit all learners** (Figure 2.2).<sup>32</sup> Of course, the model is not without its critics. Many gifted education experts have voiced concerns related to the conspicuousness with which gifted students are removed from the classroom setting and schools' regular struggles to develop challenging and appropriate curriculum that does not intrude upon the traditional grade-level material.<sup>33</sup> Perhaps the most common criticism of the model, however, relates to the comparatively small amount of time that gifted students are challenged and allowed to indulge their intellectual curiosities.<sup>34</sup> "For half an hour once a week you get to be appropriately challenged," says Jeff Hipskind, Director of Gifted Education for the Arizona Department of Education. "The rest of the week you are a regular kid, even though you are way ahead of the curve."<sup>35</sup>

**Figure 2.2: Strengths and Weaknesses of the Pull-Out / Resource Room Model**

STRENGTHS	WEAKNESSES
Built-in opportunities for peer interaction	Limited contact time
Focus on in-depth study or new areas of learning	Part-time differentiation of curriculum
One instructional plan required	Lack of integration with regular classroom work

Source: Duke University<sup>36</sup>

<sup>29</sup> "A Research-Based Primer on Terminology and Educational Options for Gifted Students." Center for Talent Development, Northwestern University. <http://www.ctd.northwestern.edu/resources/displayArticle/?id=2>

<sup>30</sup> "NAGC Position Paper: Grouping." National Association for Gifted Children. Op cit.

<sup>31</sup> Ibid.

<sup>32</sup> [1] Rogers, K.B. "Grouping the Gifted and Talented: Questions and Answers." *Roeper Review*. 16:1. 1993. [http://www.davidsongifted.org/db/Articles\\_id\\_10173.aspx](http://www.davidsongifted.org/db/Articles_id_10173.aspx)

[2] Tomlinson, C.A. "Gifted Learners and the Middle School: Problem or Promise." *The Council for Exceptional Learners*. 1995. <http://www.gifted.uconn.edu/siegle/tag/Digests/e535.html>

<sup>33</sup> "A Research-Based Primer on Terminology and Educational Options for Gifted Students." Center for Talent Development, Northwestern University. Op cit.

<sup>34</sup> [1] "Program Delivery Models for the Gifted." *Digest of Gifted Research*, Duke University. Op cit.

[2] Sausner, R. "Gifted Education: Deceived, Denied, and in a Crisis." *District Administration*. September 2005. <http://www.districtadministration.com/article/gifted-education-deceived-denied-and-crisis>

<sup>35</sup> Sausner, R. "Gifted Education: Deceived, Denied, and in a Crisis." Op cit.

<sup>36</sup> "Program Delivery Models for the Gifted." *Digest of Gifted Research*, Duke University. Op cit.

The existing base of research is generally supportive of the pull-out/resource room model. In what is perhaps the most commonly referenced meta-analysis on the subject, researchers at Purdue University evaluated nine scientific studies investigating cognitive and developmental gains for gifted students in pull-out programs, and found small to medium positive effects in the realms of overall academic achievement, critical thinking, and creativity.<sup>37</sup> Similarly, a qualitative study conducted by researchers at the University of Connecticut found that when pull-out programs were eliminated, parents reported that their gifted students became increasingly disengaged from the curriculum and suffered a loss of "...energy, curiosity, and intrinsic motivation."<sup>38</sup>

Further research conducted by the NRC/GT also lends credence to the pull-out model. Following a two-year investigation of more than 1,000 students involved in different gifted education programs, researchers concluded that, **despite limited contact time with the specialized teachers and targeted curriculum, pull-out programs appear to contribute to improved overall achievement.**<sup>39</sup>

### *HOMOGENEOUS/ABILITY GROUPING*

Homogeneous or ability grouping is one of the major strategies employed in gifted education programs across the United States and is used at approximately one in every five middle schools (see Figure 2.1).<sup>40</sup> The model generally involves placing high-ability students in a homogeneous classroom for one or more subjects – typically reading, English literature arts, or mathematics – and delivering a specialized curriculum.<sup>41</sup> In some instances, homogeneous groupings can be full-time education programs, with schools or districts developing separate curricula for gifted learners across all subjects and grade levels.<sup>42</sup>

The current base of gifted education literature abounds with criticisms of the homogeneous/ability grouping model. Since the 1985 publication of Dr. Jeannie Oake's *Keeping Track: How Schools Structure Inequality* – a scathing rebuke of the use of ability groupings in U.S. high schools – the national discussion concerning this model has largely

<sup>37</sup> Vaughn, V., Feldhusen, J. and Asher, J. "Meta-Analyses and Review of Research on Pull-Out Programs in Gifted Education." *Gifted Child Quarterly*. 35:2. 1991, p. 97.

[http://www.nagc.org/uploadedFiles/PDF/Advocacy\\_PDFs/pull-out%20programs%20\(GCQ%2035\(2\)\).pdf](http://www.nagc.org/uploadedFiles/PDF/Advocacy_PDFs/pull-out%20programs%20(GCQ%2035(2)).pdf)

<sup>38</sup> Purcell, J. "The Effects of the Elimination of Gifted and Talented Programs on Participating Students and Their Parents." *Gifted Child Quarterly*. 37:4. 1993, p. 177.

[http://www.nagc.org/uploadedFiles/PDF/Advocacy\\_PDFs/elimination%20of%20gt%20programs%20\(GCQ%2037\(4\)\).pdf](http://www.nagc.org/uploadedFiles/PDF/Advocacy_PDFs/elimination%20of%20gt%20programs%20(GCQ%2037(4)).pdf)

<sup>39</sup> Delcourt, M., Loyd, B., Cornell, D., and Goldberg, R. "Evaluation of the Effects of Programming Arrangements on Student Learning Outcomes." National Research Center on the Gifted and Talented. 1994.

<http://www.gifted.uconn.edu/nrcgt/delcloyd.html>

<sup>40</sup> [1] "A Research-Based Primer on Terminology and Educational Options for Gifted Students." Center for Talent Development, Northwestern University. Op cit.

[2] "Program Delivery Models for the Gifted." *Digest of Gifted Research*, Duke University. Op cit.

<sup>41</sup> [1] "A Research-Based Primer on Terminology and Educational Options for Gifted Students." Center for Talent Development, Northwestern University. Op cit.

[2] Rogers, K.B. "Grouping the Gifted and Talented: Questions and Answers." Op cit.

<sup>42</sup> "NAGC Position Paper: Grouping." National Association for Gifted Children. Op cit.

revolved around perceived inequity in the public education system.<sup>43</sup> For instance, many practitioners have voiced concerns that screening mechanisms used to identify gifted children may be biased, potentially leading to the underrepresentation of minority students in gifted education programs.<sup>44</sup> However, proponents argue that, by **allowing for the delivery of a highly focused and specialized curriculum to a range of students identified as gifted, the model is the most beneficial for gifted and high ability learners** (Figure 2.3).<sup>45</sup>

**Figure 2.3: Strengths and Weaknesses of the Homogeneous / Ability Grouping Model**

STRENGTHS	WEAKNESSES
Accommodates a broad range of gifted learners	May be limited to certain subjects
Allows for uneven development patterns	May be diluted by learners not identified as gifted
Curriculum can be highly focused and specialized	May not differentiate curriculum sufficiently

Source: Duke University<sup>46</sup>

The existing base of scientific research is generally supportive of the homogeneous/ability grouping model as a means of improving achievement for gifted learners.<sup>47</sup> However, significant cognitive gains have only been identified when the homogeneous/ability grouping model is paired with a specialized or focused curriculum, suggesting that merely gathering high-ability learners in the same classroom is not a sufficient strategy for gifted education.<sup>48</sup> Conversely, research indicates some negative impacts of deliberate homogeneity. Research suggests that gifted students may experience a slight decline in self-esteem in the homogeneous/ability grouping model, likely due to the recognition that they are now performing at a similar level as the rest of the cohort.<sup>49</sup>

### *IN-CLASS CLUSTERING*

In-class clustering is a mechanism by which the **advanced curricular and instructional needs of gifted students can be met without removing them from the heterogeneous classroom setting**.<sup>50</sup> This model generally involves placing the top five to eight gifted students in a given grade level in a single mixed-ability classroom, and providing differentiated curriculum

<sup>43</sup> [1] Schugurensky, D. "History of Education: Jeannie Oakes Published Keeping Track: How Schools Structure Inequality." The University of Toronto. <http://schugurensky.faculty.asu.edu/moments/1985oakes.html>

[2] "A Research-Based Primer on Terminology and Educational Options for Gifted Students." Center for Talent Development, Northwestern University. Op cit.

<sup>44</sup> Sausner, R. "Gifted Education: Deceived, Denied, and in a Crisis." Op cit.

<sup>45</sup> [1] Demirsky Allan, S. "Ability Grouping Research Reviews: What do they Say About Grouping and the Gifted?" Educational Leadership. March 1991. <http://personalweb.donet.com/~eprice/sdallan.htm>

[2] "Program Delivery Models for the Gifted." Digest of Gifted Research, Duke University. Op cit.

<sup>46</sup> "Program Delivery Models for the Gifted." Digest of Gifted Research, Duke University. Op cit.

<sup>47</sup> "Grouping Strategies." National Association for Gifted Children. Op cit.

<sup>48</sup> Kulik, J. "An Analysis of the Research on Ability Grouping: Historical and Contemporary Perspectives." National Research Center on the Gifted and Talented. 1992, pp. xii-xiii.

<http://www.gifted.uconn.edu/nrcgt/reports/rbmd9204/rbmd9204.pdf>

<sup>49</sup> Ibid. p. xii.

<sup>50</sup> "A Research-Based Primer on Terminology and Educational Options for Gifted Students." Center for Talent Development, Northwestern University. Op cit.

and instruction by a teacher with specialized gifted training.<sup>51</sup> Currently employed in nearly 40 percent of all middle school gifted education programs (see Figure 2.1), the model is generally considered most appropriate for small schools in which there are too few gifted students to warrant more comprehensive accommodations, or for students who wish to remain more connected with the heterogeneous class.<sup>52</sup>

Since at least the mid-1980s, education practitioners have expressed concern about separating students of high ability, especially at the middle school level.<sup>53</sup> Proponents of in-class clustering note that **the model allows for the inclusion of all learners in a single classroom setting – a factor that has been shown to benefit students at all achievement and ability levels** – while providing a specialized or advanced curriculum to a small sub-set of the student body.<sup>54</sup> Furthermore, in-class clustering is often heralded as a means by which districts and schools can provide specialized instruction to gifted students on a daily basis while minimizing financial implications.<sup>55</sup> However, critics of the model have noted that in-class clustering places substantial demands on teachers to develop and deliver multiple instructional plans (Figure 2.4).<sup>56</sup>

**Figure 2.4: Strengths and Weaknesses of the In-Class Clustering Model**

STRENGTHS	WEAKNESSES
Full-time opportunity for curriculum differentiation	Assumes that students are at the same level
Built-in, heterogeneous peer group	Gifted peer interaction limited to same grade level
Flexibility to group and regroup based on student need	Multiple instructional plans required

Source: Duke University<sup>57</sup>

**Research-based evidence regarding the effectiveness of in-class clustering is mixed.**<sup>58</sup> A 1990 meta-analysis from researchers at the University of Michigan found the model to be associated with significant gains across all academic areas, while other studies have shown broad-based benefits for bright, average, and struggling students when curriculum and

<sup>51</sup> "NAGC Position Paper: Grouping." National Association for Gifted Children. Op cit.

<sup>52</sup> "A Research-Based Primer on Terminology and Educational Options for Gifted Students." Center for Talent Development, Northwestern University. Op cit.

<sup>53</sup> Tomlinson, C.A. "Gifted Learners and the Middle School: Problem or Promise." The Council for Exceptional Learners. Op cit.

<sup>54</sup> [1] Winebrenner, S. and Devlin, B. "Cluster Grouping of Gifted Students: How to Provide Full-Time Services on a Part-Time Budget." ERIC Digest. 2001. <http://www.gifted.uconn.edu/siegle/tag/Digests/e607.html>

[2] "Grouping Strategies." National Association for Gifted Children. <http://www.nagc.org/index.aspx?id=3414>

<sup>55</sup> [1] Winebrenner, S. and Devlin, B. "Cluster Grouping of Gifted Students: How to Provide Full-Time Services on a Part-Time Budget." Op cit.

[2] Brulles, D., Cohn, S., and Saunders, R. "Improving Performance for Gifted Students in a Cluster Grouping Model." Journal for the Education of the Gifted. 34:2. 2010.

[http://www.davidsongifted.org/db/Articles\\_id\\_10691.aspx](http://www.davidsongifted.org/db/Articles_id_10691.aspx)

<sup>56</sup> "Program Delivery Models for the Gifted." Digest of Gifted Research, Duke University. Op cit.

<sup>57</sup> Ibid.

<sup>58</sup> [1] "A Research-Based Primer on Terminology and Educational Options for Gifted Students." Center for Talent Development, Northwestern University. Op cit.

[2] Winebrenner, S. and Devlin, B. "Cluster Grouping of Gifted Students: How to Provide Full-Time Services on a Part-Time Budget." Op cit.

instruction are differentiated within the classroom.<sup>59</sup> Similarly, a 1999 study by Dr. Nancy Melser of Ball State University concluded that gifted students embedded in an in-class clustering model saw the same gains in literacy achievement as their gifted peers in more homogeneous classroom settings, but tended to display higher self-esteem, perhaps due to a reduced competition among students.<sup>60</sup> Conversely, a 1994 study sponsored by the NRC/GT found that of the four investigated models – in-class clustering, separate homogeneous classes, full-time gifted schools, and pull-out programs – students in the in-class clustering systems typically saw the smallest achievement gains.<sup>61</sup>

*Schools must ensure that teachers in a clustering model are prepared to develop and deliver differentiated curriculum.*

However, Dr. Joseph Renzulli, a Professor of Educational Society at the University of Connecticut and Director of the NRC/GT, believes that, **when properly implemented, in-class clustering can be an effective model for gifted education.**<sup>62</sup>

In particular, Dr. Renzulli advises that schools and districts ensure that the curriculum is adequately differentiated, providing more in-depth assignments and exercises for high-achieving and high-ability students.<sup>63</sup> Schools must also ensure that teachers are adequately trained in both gifted and differentiated instruction, perhaps supplying resource specialists to work with high-achieving students in the heterogeneous classroom setting.<sup>64</sup>

## CURRICULAR AND INSTRUCTIONAL MODELS

A joint statement from the National Middle School Association (NMSA) and the NAGC firmly advocates for the development of high-quality curriculum and instruction to meet the needs of gifted learners in the middle grades.<sup>65</sup> Noting differences in the “...cognitive skills, interests, modes of learning, and motivations” between high-ability adolescents and their peers, the statement identifies critical elements for the identification, assessment, and support of gifted middle school learners, helping to create equity and excellence in educational opportunities for all students.<sup>66</sup> This subsection provides a detailed overview of three curricular models and educational techniques most commonly employed in gifted education programs – differentiation, acceleration, and enrichment – and discusses best practices for developing each at the middle school level.

<sup>59</sup> [1] Rogers, K.B. “Grouping the Gifted and Talented: Questions and Answers.” Op cit.

[2] “Grouping Strategies.” National Association for Gifted Children. Op cit.

<sup>60</sup> Holloway, J. “Research Link: Grouping Gifted Students.” Educational Leadership. 61:2. 2003.

<http://www.ascd.org/publications/educational-leadership/oct03/vol61/num02/-Grouping-Gifted-Students.aspx>

<sup>61</sup> Delcourt, M. et al. “Evaluation of the Effects of Programming Arrangements on Student Learning Outcomes.” National Research Center on the Gifted and Talented. Op cit.

<sup>62</sup> Holloway, J. “Research Link: Grouping Gifted Students.” Op cit.

<sup>63</sup> Cleaver, S. “Smart and Bored: Are We Failing our High Achievers.” Scholastic.

<http://www.scholastic.com/teachers/article/smart-and-bored>

<sup>64</sup> Holloway, J. “Research Link: Grouping Gifted Students.” Op cit.

<sup>65</sup> “Meeting the Needs of High Ability and High Potential Learners in the Middle Grades.” The National Middle School Association and The National Association for Gifted Children. <http://www.nagc.org/index.aspx?id=400>

<sup>66</sup> Ibid.



## DIFFERENTIATION

Generally speaking, differentiation in education is the process of “...attending to the learning needs of a particular student or small group of students rather than the more typical pattern of teaching the class as though all individuals in it were basically alike.”<sup>67</sup> Similarly, **differentiation for gifted students consists of meticulously planned and carefully coordinated learning experiences that transcend the generalized curriculum, catering to the student’s learning needs and strengths.**<sup>68</sup> The term differentiation is widely applied in gifted education literature, but is generally understood to encompass a number of curricular models and pedagogical techniques, including:

- Acceleration of instruction;
- In-depth study;
- High complexity;
- Advanced content; and/or
- Variety of content and form.

Dr. Carol Ann Tomlinson, a professor of education at the University of Virginia and expert in the fields of curricular differentiation and gifted education, notes that **effective differentiation is critical for gifted learners, especially those in mixed-ability middle school classrooms.**<sup>69</sup> Noting the inherent variability of student’s abilities, interests, and levels of cognitive development, Dr. Tomlinson advocates developing flexible curricula and classroom structures that allow for the manipulation of content and methods to accommodate the academic diversity that is characteristic of early adolescence (Figure 2.5). This conception of differentiated instruction is especially relevant to the in-class clustering model of gifted education.

**Figure 2.5: Characteristics of Effective Differentiation in Middle School Classrooms**

CHARACTERISTIC	DESCRIPTION
Instruction is concept-focused and principle-driven.	Instructional techniques are tailored so that all students are engaged in the curriculum, applying the key concepts and understanding the principles on which the study is based.
On-going assessment of student readiness and growth are built into the curriculum.	Teachers continuously and consistently evaluate student readiness, interest, and performance, providing additional support and instructions when needed.

<sup>67</sup> Tomlinson, C. and Demirsky Allan, S. “Understanding Differentiated Instruction: Building a Foundation for Leadership.” In Tomlinson, C. and Demirsky Allan, S. (Eds.) “Leadership for Differentiating Schools and Classrooms.” 2000. <http://www.ascd.org/publications/books/100216/chapters/Understanding-Differentiated-Instruction@-Building-a-Foundation-for-Leadership.aspx>

<sup>68</sup> “NAGC Position Statement: Differentiation of Curriculum and Instruction.” National Association for Gifted Children. <http://www.nagc.org/index.aspx?id=387>

<sup>69</sup> Tomlinson, C. “Differentiating Instruction for Advanced Learners in the Mixed-Ability Middle School Classroom.” ERIC Digest. 1995. [http://www.curriculumassociates.com/professional-development/topics/diffinstruction/extras/lesson1/ra1\\_5.pdf](http://www.curriculumassociates.com/professional-development/topics/diffinstruction/extras/lesson1/ra1_5.pdf)



CHARACTERISTIC	DESCRIPTION
Flexible grouping is consistently used.	Students work in flexible arrangements that allow them to collaborate with students of similar abilities, readiness, interests, or learning styles.
Students are active explorers, while teachers guide the exploration.	The teacher works to actively facilitate learning, creating a student-centered environment and contributing to intellectual independence.

Source: Dr. C.A. Tomlinson<sup>70</sup>

### *CURRICULUM ACCELERATION*

Touted as “...one of the cornerstones of exemplary education practices” by the NAGC, curriculum acceleration is generally defined as either delivering curricular material at a faster pace or at an earlier age than typical in the educational setting.<sup>71</sup> Though most often associated with grade-skipping in early-elementary education, accelerated programs will regularly deliver two years of mathematics instruction over the course of a single year, for example, or introduce ninth grade algebra to capable sixth grade students.<sup>72</sup> According to the NAGC, acceleration fulfills three purposes in a gifted education setting, namely:<sup>73</sup>

- To adjust the pace of instruction to the students’ capability in order to develop a sound work ethic;
- To provide an appropriate level of challenge in order to avoid boredom from repetitious learning; and
- To reduce the time period necessary to complete traditional schooling.

**The existing research base is widely supportive of accelerated curricula, generally associating the model with increased student performance and interest.**<sup>74</sup> A 1992 study undertaken at the University of Michigan found that gifted students participating in accelerated classes generally outperformed non-accelerated students of similar age and aptitude by nearly a full year on standardized achievement tests.<sup>75</sup> Another study investigating students’ perceptions of accelerated curricula found that 71 percent were satisfied with their experience, with the majority of the unsatisfied students indicating that they would have preferred more acceleration.<sup>76</sup>

<sup>70</sup> Ibid.

<sup>71</sup> [1] “NAGC Position Paper: Acceleration.” National Association for Gifted Children.

<http://www.nagc.org/index.aspx?id=383>

[2] “Acceleration for Gifted Children: An Interview with W. Thomas Southern. Center for Talent Development, Northwestern University. <http://www.ctd.northwestern.edu/resources/topics/displayArticle/?id=15>

<sup>72</sup> “Acceleration for Gifted Children: An Interview with W. Thomas Southern. Center for Talent Development, Northwestern University. Op cit.

<sup>73</sup> Bulleted items taken verbatim from: “NAGC Position Paper: Acceleration.” National Association for Gifted Children. Op cit.

<sup>74</sup> “Acceleration for Gifted Children: An Interview with W. Thomas Southern. Center for Talent Development, Northwestern University. Op cit.

<sup>75</sup> Kulik, J. “An Analysis of the Research on Ability Grouping: Historical and Contemporary Perspectives.” Op cit. pp. vii-viii.

<sup>76</sup> Lubinski, D., Webb, R., Morelock, M., and Benbow, C. “Top 1 in 10,000: A 10-Year Follow-Up of the Profoundly Gifted.” Op cit.

Despite strong evidence of its efficacy, acceleration – in any other form than grade skipping – is rarely practiced.<sup>77</sup> Opponents of the model often cite anecdotal evidence of poor outcomes for accelerated students, especially as they relate to appropriate social and emotional development, as well as the inherent difficulty in finding a rate of content delivery that satisfies the entire spectrum of gifted students in a class.<sup>78</sup> However, many gifted education experts believe that the supposed effects of acceleration on social development are one of the most commonly held misconceptions surrounding gifted education; to date, **there is no research-based evidence linking participation in accelerated curricular programs to stunted or abnormal social and emotional development.**<sup>79</sup>

A number of leading gifted education organizations, including the National Middle School Association, the National Association for Gifted Children, and the California Association for the Gifted advocate acceleration as an appropriate curricular model for gifted educational programming in the middle grades.<sup>80</sup>

### *CURRICULUM ENRICHMENT*

Curriculum enrichment – defined as increasing the “depth and breadth” of content delivery – is a widely employed curricular model throughout K-12 gifted education in the United States.<sup>81</sup> The model typically involves broadening the scope of the curriculum, often through the inclusion of practices and exercises that foster problem-solving skills, critical thinking, and creative solutions.<sup>82</sup> The curriculum enrichment model is often employed in conjunction with the pull-out/resource room and in-class clustering models of gifted education.<sup>83</sup>

Though districts and schools tend to pore over the decision to adopt an enriched or accelerated curriculum, gifted education experts advise that the two should not be viewed as mutually exclusive.<sup>84</sup> The existing body of literature is **largely supportive of adopting gifted education models that incorporate elements of curricular enrichment and acceleration**, with most research-based studies showing the greatest gains when high-

<sup>77</sup> “A Research-Based Primer on Terminology and Educational Options for Gifted Students.” Center for Talent Development, Northwestern University. Op cit.

<sup>78</sup> Ibid.

<sup>79</sup> [1] “Acceleration of Gifted Students.” Florida Department of Education. 2003.

[http://www.fldoe.org/ESE/pdf/gift\\_accel.pdf](http://www.fldoe.org/ESE/pdf/gift_accel.pdf)

[2] “Acceleration for Gifted Children: An Interview with W. Thomas Southern. Center for Talent Development, Northwestern University. Op cit.

<sup>80</sup> [1] “Meeting the Needs of High Ability and High Potential Learners in the Middle Grades.” The National Middle School Association and The National Association for Gifted Children. Op cit.

[2] “Position Paper: Middle School GATE Services.” California Association for the Gifted.

<http://c.ymcdn.com/sites/www.cagifted.org/resource/resmgr/docs/position19ms.pdf>

<sup>81</sup> “Program Delivery Models for the Gifted.” Digest of Gifted Research, Duke University.

<sup>82</sup> “A Research-Based Primer on Terminology and Educational Options for Gifted Students.” Center for Talent Development, Northwestern University. Op cit.

<sup>83</sup> Winebrenner, S. and Devlin, B. “Cluster Grouping of Gifted Students: How to Provide Full-Time Services on a Part-Time Budget.” Op cit.

<sup>84</sup> “A Research-Based Primer on Terminology and Educational Options for Gifted Students.” Center for Talent Development, Northwestern University. Op cit.

ability students are exposed to both models.<sup>85</sup> Evidence presented by the Northwestern University Center School of Education and Social Policy suggests that, in practice, enrichment and acceleration models are often complementary, with high quality enrichment typically resulting in the presentation of advanced content.<sup>86</sup>

Perhaps the best-known curricula enrichment ideology, the **School-Wide Enrichment Model (SEM)** is a widely implemented, research-based approach designed to promote challenging and high-quality learning opportunities for students of all ability levels.<sup>87</sup> Founded in models developed for gifted learners, SEM employs a practical, engaging, and challenging curriculum derived from student strengths and interests across all ability-levels at a school.<sup>88</sup> Evidence suggests that SEM can be an effective means of improving student achievement in schools with different socioeconomic characteristics and with different organizational patterns.<sup>89</sup>

## IDENTIFICATION AND ASSESSMENT

Though models for the identification of gifted students are quite common within the existing base of literature, it appears that no set of research-based best practices has been specifically tailored to the middle grades. Accordingly, this subsection presents research-based evidence for the identification and assessment of gifted students generalized for all grade levels.

The cognitive development occurring in early adolescence is often associated with the formation of academic interests and the development of intellectual awareness.<sup>90</sup> As a result, many students who were not identified as gifted during their elementary education may benefit from more challenging curriculum, alternative delivery structures, or increased interaction with peers of similar abilities available through a middle school gifted education program. Accordingly, schools and districts should establish protocols that allow for the regular evaluation of students, taking into account participation and progress.<sup>91</sup>

<sup>85</sup> [1] Kulik, J. "An Analysis of the Research on Ability Grouping: Historical and Contemporary Perspectives." Op cit. pp. vii-viii.

[2] "Acceleration: What the Research Says." National Association for Gifted Children. Op cit.

<sup>86</sup> "A Research-Based Primer on Terminology and Educational Options for Gifted Students." Center for Talent Development, Northwestern University. Op cit.

<sup>87</sup> "The School-Wide Enrichment Model." Neag Center for Gifted Education and Talent Development at the University of Connecticut. <http://www.gifted.uconn.edu/sem/>

<sup>88</sup> Renzulli, J. and Reis, S. "The School-Wide Enrichment Model: Executive Summary." Neag Center for Gifted Education and Talent Development at the University of Connecticut. <http://www.gifted.uconn.edu/sem/semexec.html>

<sup>89</sup> Reis, S. and Renzulli, J. "The School Wide-Enrichment Model: A Focus on Student Strengths and Interests." In Renzulli, J. and Gubbins, E. (Eds.) "Systems and Models for Developing Programs for the Gifted and Talented." 2009, p. 323. [http://www.gifted.uconn.edu/sem/pdf/Systems\\_and\\_Models-ReisRenzulli.pdf](http://www.gifted.uconn.edu/sem/pdf/Systems_and_Models-ReisRenzulli.pdf)

<sup>90</sup> Tomlinson, C.A. "Gifted Learners and the Middle School: Problem or Promise." The Council for Exceptional Learners. 1995. <http://www.gifted.uconn.edu/siegle/tag/Digests/e535.html>

<sup>91</sup> Renzulli, J. "A Practical System for Identifying Gifted and Talented Students." The National research Center on the Gifted and Talented. <http://www.gifted.uconn.edu/sem/semart04.html>

The NAGC generally advises that assessments for giftedness should not be conducted in isolation and should not use only one instrument or method.<sup>92</sup> Instead, the assessment of a student's ability should gather information from *multiple sources*, such as teachers, families, and other students; use *a variety of techniques*, including observations, performances, and portfolios; and assess abilities in *a variety of contexts*, including in-class and out-of-school. The NAGC also supports the use of standardized achievement, intelligence, and creativity tests in the identification process, when administered by trained and qualified personnel.<sup>93</sup>

### INTELLIGENCE TESTS

One critical argument against the exclusive use of traditional intelligence tests to determine giftedness is that they may be biased against children who are from the cultural and linguistic minority. In fact, many psychologists believe that no such test is completely without a degree of cultural bias.<sup>94</sup> Consequently, **the results of IQ tests should be interpreted with extreme caution and should never be used to definitively include or exclude children from specialized programs.**<sup>95</sup> To overcome the majority bias in most intelligence tests, accommodations should be made for children to take the test in their native language, where possible.<sup>96</sup>

As a means of minimizing the possible effects of a cultural or linguistic bias inherent to a standardized test, many experts advise that schools and districts use a non-verbal assessment tool, such as the **Naglieri Nonverbal Test of Ability (NNAT2)** or the **Raven's Progressive Matrices**, for the identification of gifted minority students.<sup>97</sup> Research shows that these two testing systems identify gifted children of color more reliably than most intelligence and IQ tests. The Center for Talent Development at Northwestern University advocates for the use of non-verbal tests in conjunction with other "traditional" assessment tools in order to capture the full range of needs presented by gifted and high-achieving students.<sup>98</sup>

Another debate in the literature discusses whether intelligence tests—if used—should be administered individually or in a small group setting.<sup>99</sup> There is evidence to suggest that individually-administered intelligence tests increase the measurement error associated with identifying giftedness, and some studies have found inconsistencies when these tests were

<sup>92</sup> "NAGC Position Statement: Using Tests to Identify Gifted Students." National Association for Gifted Children. <http://www.nagc.org/index.aspx?id=404>

<sup>93</sup> Ibid.

<sup>94</sup> Benson, E. "Intelligence Across Cultures" American Psychological Association. February 2003. <http://www.apa.org/monitor/feb03/intelligence.aspx>

<sup>95</sup> "NAGC Position Statement: Using Tests to Identify Gifted Students." National Association for Gifted Children. Op cit.

<sup>96</sup> "NAGC Position Statement: Use of the WIC-IV for Gifted Identification." National Association for Gifted Children. <http://www.nagc.org/index.aspx?id=2455>

<sup>97</sup> "Is Your School Using the Best Practices for Instruction." Center for Talent Development, Northwestern University. Winter 2003. <http://www.ctd.northwestern.edu/resources/displayArticle?id=132>

<sup>98</sup> Ibid.

<sup>99</sup> Yang, Y. "Identification of Young, Gifted Children: An Analysis of Instruments and Recommendations for Practice." Gifted Education Resource Institute, College of Education, Purdue University, pp. 4-5. [http://geri.education.purdue.edu/PDF%20Files/yang\\_WCGTC\\_paper\\_mg7.pdf](http://geri.education.purdue.edu/PDF%20Files/yang_WCGTC_paper_mg7.pdf)

used to identify young gifted children. Furthermore, individually-administered tests are expensive and time-consuming, and can "...put twice-exceptional children, children from culturally diverse backgrounds, or those children from low-income families in a disadvantaged position."<sup>100</sup> However, some practitioners argue that individually-administered tests are better than group-administered tests in identifying gifted children.<sup>101</sup> Group-administered tests are also less costly and easier to interpret, but they are quite time-consuming to administer because a group of students typically completes these tests in multiple sittings.<sup>102</sup> Furthermore, these assessments require a certain level of language proficiency to understand directions and to take the test, which may limit the settings in which they are applicable.<sup>103</sup>

## ADMINISTRATION OF GIFTED EDUCATION PROGRAMS

This subsection describes critical considerations in the development and continued administration of gifted education programs in the middle grades. The section begins with a discussion of the NAGC's six guiding principles for planning gifted education programs, continues with a discussion of staffing and training needs for teachers, and concludes with a discussion of the structures required to support the unique social and emotional needs of high-ability middle school students.

### PLANNING MIDDLE SCHOOL GIFTED EDUCATION PROGRAMS

According to the NAGC, successful gifted education program design must include "...comprehensive services based on sound philosophical, theoretical, and empirical support."<sup>104</sup> The NAGC has developed six guiding principles to help districts address the most critical elements for program success and sustainability, while ensuring equal access and equitable opportunity for students (Figure 2.6). These basic principles support the tenets set forth in the NMSA and NAGC's joint position statement on *Meeting the Needs of High Ability and High Potential Learners in the Middle Grades* by establishing a basic framework for differentiated education, emotional and affective support, and support from a strong research base.<sup>105</sup>

<sup>100</sup> Ibid.

<sup>101</sup> "Gifted Education." Macomb Intermediate School District.  
[http://www.misd.net/gifted/giftedchildren.htm#Defining Giftedness](http://www.misd.net/gifted/giftedchildren.htm#Defining%20Giftedness)

<sup>102</sup> "Testing and Assessment: What Do the Tests Tell Us?" Hoagies' Gifted Education Page.  
[http://www.hoagiesgifted.org/tests\\_tell\\_us.htm](http://www.hoagiesgifted.org/tests_tell_us.htm)

<sup>103</sup> Yang, Y. Op cit.

<sup>104</sup> "Gifted Education Programming Criterion: Program Design." National Association of Gifted Children. 2000.  
[http://www.nagc.org/uploadedfiles/pdf/standards\\_pdfs/program%20design%20chart.pdf](http://www.nagc.org/uploadedfiles/pdf/standards_pdfs/program%20design%20chart.pdf)

<sup>105</sup> "Meeting the Needs of High Ability and High Potential Learners in the Middle Grades." The National Middle School Association and The National Association for Gifted Children. Op cit.

**Figure 2.6: NAGC Guiding Principles for Planning Gifted Education Programs**

GUIDING PRINCIPLES	
1)	Rather than a single gifted program, a continuum of programming services must exist for gifted learners.
2)	Gifted education must be adequately funded.
3)	Gifted education programming must evolve from a comprehensive and sound base.
4)	Gifted education services must be an integral part of the general education school day.
5)	Flexible groupings of students must be developed in order to facilitate differentiated instruction and curriculum.
6)	Policies specific to adapting and adding to the nature and operations of the general education program are necessary for gifted education.

Source: National Association for Gifted Children<sup>106</sup>

### STAFFING AND PROFESSIONAL DEVELOPMENT

Most gifted students in the U.S. education system spend the majority of their school day in a general education setting.<sup>107</sup> Such arrangements require that teachers, especially those responsible for delivering instruction in the in-class cluster model, are well-versed in the appropriate pedagogical techniques to meet the needs of a diverse range of students.<sup>108</sup> While only a few states require that teachers involved in gifted education programs receive specialized training, most **experts and advocacy groups agree that substantive professional development should be considered an integral part of all gifted education programs.**<sup>109</sup>

The NAGC and Council for Exceptional Children have developed a set of generalized programming standards to assist schools and districts in the development of effective and efficient professional development programs for gifted education leaders (Figure 2.7). These seven standards establish a set of basic principles and practices that all educators and administrators involved in specialized education for high-ability students should understand and effectively translate into practice.

**Figure 2.7: Standards for Educator Preparation**

STANDARD	KEY ELEMENTS
Gifted education professionals understand the variations in learning and development in cognitive and affective areas between and among individuals with gifts and talents and apply this understanding to provide meaningful and challenging learning experiences for individuals with exceptionalities.	<ul style="list-style-type: none"> <li>Understanding of how language, culture, economic status, family background, and disability can influence the learning patterns of gifted students.</li> <li>Understanding of personal development and individual needs to respond to specific student's educational requirements.</li> </ul>

<sup>106</sup> "Pre-K – Grade 12 Gifted Program Standards." National Association of Gifted Children. 2000, p. 6.

[http://www.nagc.org/uploadedFiles/PDF/Standards\\_PDFs/k12%20GT%20standards%20brochure.pdf](http://www.nagc.org/uploadedFiles/PDF/Standards_PDFs/k12%20GT%20standards%20brochure.pdf)

<sup>107</sup> "Training Teachers in Gifted and Talented Education." National Association of Gifted Children.

<http://www.nagc.org/index.aspx?id=3422>

<sup>108</sup> Tomlinson, C. and Demirsky Allan, S. "Understanding Differentiated Instruction: Building a Foundation for Leadership." Op cit.

<sup>109</sup> "Training Teachers in Gifted and Talented Education." National Association of Gifted Children. Op cit.

STANDARD	KEY ELEMENTS
Gifted education professionals create safe, inclusive, and culturally responsive learning environments so that individuals with gifts and talents become effective learners and develop social and emotional well-being.	<ul style="list-style-type: none"> <li>• Forming safe, inclusive, culturally responsive learning environments that engage individuals with gifts.</li> <li>• Demonstrating an understanding of the continuum of services for individuals with gifts and talents.</li> </ul>
Gifted education professionals use knowledge of general and specialized curricula to advance learning for individuals with gifts and talents.	<ul style="list-style-type: none"> <li>• Developing appropriate curricular and instructional modifications for gifted students to enhance creativity and add depth and complexity to lessons.</li> <li>• Using assessments to select, adapt, and create materials to differentiate instructional strategies.</li> </ul>
Gifted education professionals use multiple methods of assessment and data sources in making educational decisions about identification of individuals with gifts and talents and student learning.	<ul style="list-style-type: none"> <li>• Using technically sound formal and informal assessments to identify student for gifted education programs and services.</li> <li>• Using multiple types of assessment to identify and support gifted learners.</li> </ul>
Gifted education professionals select, adapt, and use a repertoire of evidence-based instructional strategies to advance the learning of individuals with gifts and talents.	<ul style="list-style-type: none"> <li>• Developing a repertoire of instructional strategies to enhance critical thinking and problem-solving abilities in gifted students.</li> <li>• Using instructional strategies that enhance the affective development of gifted students.</li> </ul>
Gifted education professionals use foundational knowledge of the field and professional ethical principles and programming standards to inform gifted education practice, to engage in lifelong learning, and to advance the profession.	<ul style="list-style-type: none"> <li>• Observing ethical principles and program standards to guide the instruction of gifted students.</li> <li>• Understanding of how foundational knowledge, perspectives, and historical and current issues influence their professional practice.</li> </ul>
Gifted education professionals use foundational knowledge of the field and professional ethical principles and programming standards to inform gifted education practice, to engage in lifelong learning, and to advance the profession.	<ul style="list-style-type: none"> <li>• Serving as a collaborative resource for colleagues and understanding the elements of effective collaboration.</li> <li>• Using collaborative processes to promote the well-being of gifted students across a wide range of settings, experiences, and contexts.</li> </ul>

Source: National Association for Gifted Children and Council for Exceptional Children<sup>110</sup>

### MEETING THE AFFECTIVE AND EMOTIONAL NEEDS OF GIFTED MIDDLE SCHOOLERS

Young adolescence, typically identified as the period between ages 10 and 15, is marked by substantial physical, cognitive, and psychosocial changes, which often are associated with increased potential for both positive and negative outcomes.<sup>111</sup> In addition to the range of difficulties encountered at this age, gifted young adolescents frequently report an additional range of problems related to their abilities, including competitiveness, unrealistic self-assessment, peer rejection, parental and social pressures to excel, and being inadequately challenged by the school curriculum.<sup>112</sup> Education researchers and practitioners alike generally recommend that creating appropriately challenging and supportive middle school

<sup>110</sup> "NAGC – CEC Teacher Preparation Standards in Gifted and Talented Education." National Association for Gifted Children and Council for Exceptional Children.  
[http://www.nagc.org/uploadedFiles/Information\\_and\\_Resources/NCATE\\_standards/NAGC-%20CEC%20CAEP%20standards%20\(2013%20final\).pdf](http://www.nagc.org/uploadedFiles/Information_and_Resources/NCATE_standards/NAGC-%20CEC%20CAEP%20standards%20(2013%20final).pdf)

<sup>111</sup> [1] "Human Development: Physical and Cognitive Development in Adolescence." McGraw-Hill. 2006.  
[http://highered.mcgraw-hill.com/sites/0073133809/student\\_view0/chapter11/](http://highered.mcgraw-hill.com/sites/0073133809/student_view0/chapter11/)

[2] Eccles, J. and Wigfield, A. "Social Patterns, Achievements, and Problems." In Kazdin, A.E. (Ed.) *Encyclopedia of Psychology*. Vol. I. 2000, p. 47. <http://www.rcgd.isr.umich.edu/garp/articles/eccles00q.pdf>

<sup>112</sup> Buescher, T. and Higham, S. "Helping Adolescents Adjust to Giftedness." Council for Exceptional Children. 1990, p.2. <http://files.eric.ed.gov/fulltext/ED321494.pdf>



structures can help gifted students adjust to the middle school context and better prepare them for the subsequent transition to high school.<sup>113</sup>

In addition, several researchers and advocacy groups propose specific strategies to accommodate the affective needs of gifted middle school students. For instance, the California Association for the Gifted recommends placing gifted students on school teams and advisory groups that have a high number similarly gifted peers, as well as encouraging participation in several extracurricular activities that align with their personal interests and talents.<sup>114</sup> Similarly, the NMSA-NAGC *Joint Statement* notes that gifted middle school students typically **thrive in environments that affirm both their cognitive capacities and their need to belong to a peer group.**<sup>115</sup> Middle school educators should be aware of this dichotomy, and lend appropriate support to help these students define themselves and their role amongst their peers.<sup>116</sup>

---

<sup>113</sup> Mizelle, N. "Helping Middle School Students Make the Transition to High School." ERIC Digest. 2000.  
<http://www.nagc.org/index.aspx?id=327>

<sup>114</sup> "Position Paper: Middle School GATE Services." California Association for the Gifted. Op cit.

<sup>115</sup> "Meeting the Needs of High Ability and High Potential Learners in the Middle Grades." The National Middle School Association and The National Association for Gifted Children. Op cit.

<sup>116</sup> Ibid.



## SECTION III: PROFILES

In this section, Hanover Research presents profiles of gifted education programs administered by three districts across the United States: Chapel Hill – Carrboro City Schools (North Carolina), Scottsdale Unified School District (Arizona), and Virginia Beach Public Schools (Virginia). Each of these profiles contains general information about the district’s gifted programming options, as well as middle grades-specific information related to the identification and assessment of gifted students, and available models of education to meet students’ needs. The districts presented in this section were chosen based on their novel or innovative practices, to provide a range of practical examples for gifted programming, as well as to represent practices at small, mid-sized, and large districts.

### CHAPEL HILL – CARRBORO CITY SCHOOLS

Chapel Hill – Carrboro City Schools (CH-CCS) is a mid-sized urban school district serving Orange County in North Carolina’s Research Triangle. The CH-CCS Academically or Intellectually Gifted (AIG) Program provides differentiated educational opportunities to high ability learners to “...enable them to grow as dynamic thinkers, creative problem solvers, and compassionate leaders.”<sup>117</sup> CH-CCS offers a range of gifted programs and services at the elementary, middle, and high school levels, including an Academic Nurturing and Enrichment program for students in grades 1-5, Gifted Education and Highly Gifted Education programs for students in grades 3-12, and a Learning Environment for Advanced Programming service for students in grades 4-8.<sup>118</sup>

#### CHAPEL HILL CARRBORO CITY SCHOOLS

Orange County, NC

- Total Students: 11,709
- Total Teachers: 907
- Total Schools: 19

### IDENTIFICATION AND ASSESSMENT

Chapel Hill – Carrboro City Schools conducts universal screenings of all third grade students in the district using the NNAT2 and places all students scoring at or above the 90<sup>th</sup> percentile in one of several gifted education tracks.<sup>119</sup> Students may also become eligible for AIG service and programming in grades 1-2 and 4-12 by receiving a nomination from a teacher, gifted education specialist, parent, or community member, or by scoring in at least the 95<sup>th</sup> percentile in the district-wide Beginning of Grade or End of Grade Tests.<sup>120</sup> Middle school students are eligible for nomination to the gifted program once each year in grades 6-8, with the nominating person responsible for providing data related to the student’s performance on standardized tests and/or diagnostics assessments, or submitting a

<sup>117</sup> “Gifted Education.” Chapel Hill – Carrboro City Schools.

[http://www.chccs.k12.nc.us/group\\_profile\\_view.aspx?id=1E187381-AEEF-4312-B67B-42BF7ADCE7B0](http://www.chccs.k12.nc.us/group_profile_view.aspx?id=1E187381-AEEF-4312-B67B-42BF7ADCE7B0)

<sup>118</sup> Ibid.

<sup>119</sup> “Gifted Education Option Identification Process Grades 1-8: 2013-2016.” Chapel Hill – Carrboro City Schools.  
[https://docs.google.com/file/d/0BwqRM-Q89Tq\\_cnM1Uk9PdC1PTHc/edit](https://docs.google.com/file/d/0BwqRM-Q89Tq_cnM1Uk9PdC1PTHc/edit)

<sup>120</sup> Ibid.

portfolio of work demonstrating the student's high ability.<sup>121</sup> The performance of students involved in AIG programs at CH-CCS is reviewed annually to determine whether the services continue to appropriately meet the student's needs.<sup>122</sup>

### *GIFTED AND HIGHLY GIFTED EDUCATION*

High-ability middle school students in CH-CCS schools are presented with two primary alternatives for gifted education – Gifted Education (GE) and Highly Gifted Education (HGE) – both of which are based primarily in the in-class clustering and pull-out/resource room models.<sup>123</sup> Sixth, seventh, and eighth grade students are generally identified as gifted in English language arts, mathematics, or both, and placed in clusters alongside students with similar learning needs. All district middle schools also employ a Gifted Education Specialist who interacts with students directly in pull-out exercises, assists teachers in developing appropriately differentiated curriculum, and helps develop a Differentiated Education Plan (DEP) that outlines opportunities for advanced exercises in literature, vocabulary, writing, problem solving, and critical and creative thinking.<sup>124</sup>

*All of the district's schools employ a Gifted Education Specialist who helps teachers develop curriculum, oversee pull-out strategies, and help develop Differentiated Education Plans.*

Chapel Hill – Carrboro City Schools also provides opportunities for middle school students to participate in an accelerated curriculum, especially in mathematics.<sup>125</sup> Students who have demonstrated a mastery of grade-level math principles may be transitioned into an above-grade-level math course or instructed in an accelerated math course with other students of similar abilities and needs.<sup>126</sup> All CH-CCS middle schools also offer enrichment elective courses, such as African-American Studies, Creative Writing, and Public Speaking, which allow gifted students to indulge their intellectual curiosity and develop critical cognitive and social skills.<sup>127</sup>

<sup>121</sup> [1] "Parent Guide to AIG Programs: 2013-2014" Chapel Hill – Carrboro City Schools. p. 6.

[https://docs.google.com/document/d/11juA6oRdOettXc7J\\_jKbpAEyyUwX5\\_8w9br7m\\_ryMV4/edit](https://docs.google.com/document/d/11juA6oRdOettXc7J_jKbpAEyyUwX5_8w9br7m_ryMV4/edit)

[2] "Middle School Nomination Form for Gifted Education Services." Chapel Hill – Carrboro City Schools.

<https://docs.google.com/document/d/1nVstm8q4Z2gJEiFGyO9bvcmWcvMP1yIAOMmJwxbJDCC/edit>

<sup>122</sup> "Locally Academically or Intellectually Gifted Plan: 2013-2016." Chapel Hill – Carrboro City Schools. p. 16.

[https://docs.google.com/document/d/1ta8Eu1DxM3lphuwk9tubf4mIxGubar6h8m8RjgG\\_Gsl/edit](https://docs.google.com/document/d/1ta8Eu1DxM3lphuwk9tubf4mIxGubar6h8m8RjgG_Gsl/edit)

<sup>123</sup> "Parent Guide to AIG Programs: 2013-2014" Chapel Hill – Carrboro City Schools. p. 4. Op cit.

<sup>124</sup> Ibid.

<sup>125</sup> Ibid.

<sup>126</sup> "Locally Academically or Intellectually Gifted Plan: 2013-2016." Chapel Hill – Carrboro City Schools. Op cit. p. 10.

<sup>127</sup> [1] "Parent Guide to AIG Programs: 2013-2014" Chapel Hill – Carrboro City Schools. p. 4. Op cit.

[2] "Courses at CH-CCS: 6<sup>th</sup> Grade Courses." Chapel Hill – Carrboro City Schools.

<http://courses.chccs.k12.nc.us/home/middle-school-courses/6th-grade-courses>

### LEARNING ENVIRONMENT FOR ADVANCED PROGRAMMING

The Learning Environment for Advanced Programming (LEAP) program at CH-CCS is designed for students in grades 4-8 who have demonstrated a consistent mastery of reading, mathematics, and other interdisciplinary subjects that are two or more grade levels above their age.<sup>128</sup> The LEAP program places such children in homogeneous classrooms staffed by Gifted Education Specialists and delivers an accelerated and highly specialized curriculum that emphasizes depth of knowledge and analysis in all subjects.<sup>129</sup> Currently, all LEAP programming is offered at only one of the district's four middle schools, though the district provides transportation for such students to and from the school site.<sup>130</sup>

### SCOTTSDALE UNIFIED SCHOOL DISTRICT

Scottsdale Unified School District (SUSD) is a mid-sized urban school district serving the City of Scottsdale in south-central Arizona. SUSD offers gifted programming at the elementary, middle, and high school levels, providing "...challenging curriculum to gifted students through the use of differentiated instruction designed to best meet the academic and affective needs of the students."<sup>131</sup> At the middle school level, SUSD offers several gifted education options, including clustered mathematics and English language arts programs, interest-based electives, and site-specific full-time programs.<sup>132</sup>

#### SCOTTSDALE UNIFIED SCHOOL DISTRICT Scottsdale, AZ

- Total Students: 26,235
- Total Teachers: 1,417
- Total Schools: 34

### IDENTIFICATION AND ASSESSMENT

In accordance with the State of Arizona, SUSD gifted services are available to all students scoring in the 97<sup>th</sup> percentile or above in any state-approved test administered by authorized SUSD personnel or qualified third-party professionals.<sup>133</sup> The district conducts universal screenings of all second grade students, with parental consent, using the Cognitive Abilities Test (CogAT) and the NNAT2.<sup>134</sup> Subsequent testing for students in grades 3-12 is conducted only at the request of teachers, parents, or guardians, and is offered three times each academic year; however, students may only be assessed annually.<sup>135</sup>

<sup>128</sup> "Gifted Education." Chapel Hill – Carrboro City Schools. Op cit.

<sup>129</sup> "Parent Guide to AIG Programs: 2013-2014" Chapel Hill – Carrboro City Schools. pp. 4-5. Op cit.

<sup>130</sup> Ibid.

<sup>131</sup> "Gifted Education: Vision and Goals." Scottsdale Unified School District. <https://gifted.susd.org/vision/>

<sup>132</sup> "Gifted Services." Scottsdale Unified School District. p. 8.

<http://susdcommunityed.org/wp-content/uploads/2012/12/2012-2013-Parent-UniversityGiftedServices.pdf>

<sup>133</sup> "Gifted Education: Welcome to SUSD Gifted Programs." Scottsdale Unified School District. <https://gifted.susd.org/>

<sup>134</sup> "Gifted Education: Gifted Programming Testing Information." Scottsdale Unified School District.

<https://gifted.susd.org/testing/>

<sup>135</sup> "Gifted Education: What is the Process for Identification at SUSD?" Scottsdale Unified School District.

<https://gifted.susd.org/faq/what-process-identification-susd/>

### *THE COMPREHENSIVE GIFTED PROGRAM*

The Comprehensive Gifted Program (CGP) at SUSD is a full-time, self-contained educational track offered at two of the district's elementary schools and three middle schools.<sup>136</sup> Students enrolled in the CGP are generally identified as those possessing advanced "intellectual, academic, or creative abilities," and are instructed using a specialized curriculum that emphasizes interdisciplinary coursework, academic rigor, critical analysis, and creative problem solving.<sup>137</sup> Enrollment in the CGP requires that students or parents submit an application packet documenting a score in at least the 97<sup>th</sup> percentile of an approved test as well as a record of advanced academic achievement, as measured by relevant state-wide or district standardized assessments.<sup>138</sup> Additionally, interested students must receive at least two recommendations from teachers using the district's "Gifted Characteristics Profile," a rubric on which teachers offer an assessment of a student's aptitude in five key areas: intellectuality, creativity, task commitment, extraordinary development in the arts, and leadership ability.<sup>139</sup>

### *MIDDLE SCHOOL GIFTED PROGRAMMING*

In addition to the CGP, SUSD delivers gifted programming in mathematics and English language arts using accelerated curriculum and in-class clustering models, respectively.<sup>140</sup> The district's clustered English language arts program combines the Spring Board curriculum with an enrichment model to improve the "depth and breadth" of educational opportunities for gifted students.<sup>141</sup> Teachers in clustered classrooms generally employ a variety of exercises and pedagogical techniques to differentiate English language arts instruction, including:<sup>142</sup>

- Tiered assignments;
- Literature circles;
- Integration of other disciplines;
- Socratic seminars; and
- Student choice.

<sup>136</sup> "Gifted Education: Comprehensive Gifted Program." Scottsdale Unified School District. <https://gifted.susd.org/cgp/>

<sup>137</sup> "Gifted Services." Scottsdale Unified School District. Op cit. p. 12.

<sup>138</sup> "Gifted Education: Comprehensive Gifted Program." Scottsdale Unified School District.

<sup>139</sup> "Gifted Characteristics Profile." Scottsdale Unified School District.  
[https://gifted.susd.org/files/1913/7641/5826/Comprehensive\\_Gifted\\_Program\\_Application\\_Part\\_2-\\_Student\\_Profile\\_of\\_Gifted\\_Characteristics.pdf](https://gifted.susd.org/files/1913/7641/5826/Comprehensive_Gifted_Program_Application_Part_2-_Student_Profile_of_Gifted_Characteristics.pdf)

<sup>140</sup> [1] "Gifted Education: Clustered Language Arts." Scottsdale Unified School District.  
<https://gifted.susd.org/programs/middle-school/clustered-language-arts/>

[2] "Gifted Education: Readiness Level Math." Scottsdale Unified School District.  
<https://gifted.susd.org/programs/middle-school/readiness-level-math/>

<sup>141</sup> [1] "Gifted Education: Clustered Language Arts." Scottsdale Unified School District. Op cit.

[2] "Gifted Education: Middle School Programs." Scottsdale Unified School District.  
<https://gifted.susd.org/programs/middle-school/>

<sup>142</sup> "Gifted Education: Clustered Language Arts." Scottsdale Unified School District. Op cit.

Gifted mathematics education is primarily delivered through an accelerated curriculum model, termed “Readiness Level Math.”<sup>143</sup> Students in the fifth, sixth, and seventh grades are administered aptitude tests to determine which level of math instruction will be most beneficial in the subsequent year. In general, the Readiness Level Math Program allows students to be placed in mathematics courses one, two, and in rare instances three years, ahead of their grade level (Figure 3.1). However, all students are required to complete Algebra I, as it is considered a foundational course for all subsequent high school-level mathematics.<sup>144</sup>

**Figure 3.1: SUSD Readiness Level Math Options**

GRADE LEVEL	AVAILABLE MATH COURSES	EXCEPTIONALLY GIFTED OPTION
6 <sup>th</sup> Grade	<ul style="list-style-type: none"> <li>• 6<sup>th</sup> Grade Math</li> <li>• 7<sup>th</sup> Grade Math</li> </ul>	<ul style="list-style-type: none"> <li>• 8<sup>th</sup> Grade Math</li> </ul>
7 <sup>th</sup> Grade	<ul style="list-style-type: none"> <li>• 7<sup>th</sup> Grade Math</li> <li>• 8<sup>th</sup> Grade Math</li> <li>• Algebra I</li> </ul>	<ul style="list-style-type: none"> <li>• Geometry</li> <li>• Geometry/Trigonometry (Honors)</li> </ul>
8 <sup>th</sup> Grade	<ul style="list-style-type: none"> <li>• 8<sup>th</sup> Grade Math</li> <li>• Algebra I</li> <li>• Geometry</li> <li>• Geometry/Trigonometry (Honors)</li> </ul>	<ul style="list-style-type: none"> <li>• Algebra II</li> <li>• Algebra II (Honors)</li> </ul>

Source: Scottsdale Unified School District<sup>145</sup>

## VIRGINIA BEACH PUBLIC SCHOOLS

Virginia Beach Public Schools (VBPS) is a large, urban school district serving the City of Virginia Beach in southeast Virginia. VBPS offers gifted education at the elementary, middle, and high schools levels, with the stated mission of “...challenging students with differentiated interdisciplinary opportunities, providing flexible, innovative curriculum...and developing individual talents and abilities.”<sup>146</sup> At the middle school level, VBPS offers a range of gifted education options, including in-class clustering with differentiated and resource room instruction, full-time magnet programs, and advanced programs in the performing and visual arts.<sup>147</sup>

### VIRGINIA BEACH PUBLIC SCHOOLS

Virginia Beach, VA

- Total Students: 71,185
- Total Teachers: 3,935
- Total Schools: 88

<sup>143</sup> “Gifted Education: Readiness Level Math.” Scottsdale Unified School District. Op cit.

<sup>144</sup> Ibid.

<sup>145</sup> “Gifted Education: Readiness Level Math.” Scottsdale Unified School District. Op cit.

<sup>146</sup> “2010-2015: Local Plan for the Education of the Gifted.” Virginia Beach Public Schools. p. 3.

<http://www.vbschools.com/curriculum/gifted/Local%20Plan%20for%20the%20Education%20of%20the%20Gifted%202010-2015.pdf>

<sup>147</sup> “Gifted Education at the Middle School Level.” Virginia Beach Public Schools.

<http://www.vbschools.com/curriculum/gifted/midgift.asp>

### *IDENTIFICATION AND ASSESSMENT*

All first graders enrolled in VBPS schools are screened in January or February each year to assess general aptitude and students scoring at or above the 90<sup>th</sup> percentile are administered additional testing to determine the potential for enrollment in gifted education programming.<sup>148</sup> Subsequent universal testing is administered in grades 4, 6 and 9, with periodic assessment available for all students in grades 2-12 based on the recommendation of teachers, parents, guardians, gifted resource teachers, or other persons with knowledge of a student's aptitude, ability, or personal strengths.<sup>149</sup> Initial student testing is conducted using the NNAT2, with follow-up assessment based on the Stanford 10 Achievement Test. In order to ensure that gifted students are being appropriately identified, VBPS gifted resource teachers oversee staff development regarding the characteristics and indicators of gifted students, and conduct periodic reviews of student records and classroom observations in support of gifted determinations.<sup>150</sup>

### *FULL-TIME GIFTED EDUCATION PROGRAM*

Virginia Beach Public Schools has developed a full-time gifted education program for students in grades 6-8 offered at the Kemps Landing Magnet School (KLMS), serving approximately 600 students annually.<sup>151</sup> Enrollment in KLMS requires that students submit an application detailing a record of classroom achievement, scores on standardized tests, key information supplied by parents or guardians, as well as teacher recommendations.<sup>152</sup> A KLMS Student Selection Committee, comprising approximately 25 members, then reviews applications, assigns a summative score of between one and five to all applicants, and invites the highest ranking students to enroll in the school.<sup>153</sup> KLMS provides a highly structured academic environment, integrating accelerated curriculum for foreign languages, mathematics, and physical sciences with a range of elective courses that allow students to pursue their academic and creative interests.<sup>154</sup> The school also offers an exceptional range of extracurricular activities, including a Forensics Club, Robotics Club, and a range of both academic and interscholastic sports.<sup>155</sup>

### *CLUSTERED GIFTED EDUCATION PROGRAMS*

For high-ability students not enrolled in a self-contained school, VBPS offers gifted services using the in-class cluster model. Clustered learning environments are available at all VBPS schools, typically involve placing between six and eight gifted students in a heterogeneous

<sup>148</sup> "Referral for the ODC Gifted Program Services, Grade 1." Virginia Beach Public Schools. <http://www.vbschools.com/curriculum/appprocess/>

<sup>149</sup> "2010-2015: Local Plan for the Education of the Gifted." Virginia Beach Public Schools. Op cit. pp. 5-6.

<sup>150</sup> Ibid.

<sup>151</sup> [1] "Gifted Education at the Middle School Level." Virginia Beach Public Schools.

[2] "Search for Public Schools." National Center for Education Statistics. <http://nces.ed.gov/ccd/schoolsearch/>

<sup>152</sup> "2010-2015: Local Plan for the Education of the Gifted." Virginia Beach Public Schools. Op cit. p. 19.

<sup>153</sup> Ibid.

<sup>154</sup> "Gifted Education at the Middle School Level." Virginia Beach Public Schools. Op cit.

<sup>155</sup> "2013-2014 Clubs and Activities." Kemps Landing Magnet School. <http://www.kempslanding.vbschools.com/activities.html>

classroom, and are taught using differentiated curriculum by a teacher trained in gifted education.<sup>156</sup> Each middle school is also assigned one gifted resource teacher who performs a range of duties, including assisting general classroom educators in lesson planning and curriculum development, face-to-face instruction of gifted pupils, and overseeing various components of the school's gifted program.<sup>157</sup> All VBPS middle schools also employ an accelerated curriculum model, offering gifted students the opportunity to take advanced classes in English language arts, science, mathematics, and foreign languages.<sup>158</sup>

Virginia Beach Public Schools has also developed unique gifted education programming to support students that display exceptional ability in the creative arts. Students who are identified as high-ability in the visual arts have the option of enrolling in the district's Gifted Visual Arts Program, embedded in one of the district's middle schools.<sup>159</sup> Similarly, capable and interested students may enroll in the VBPS Gifted Dance Education Program. This program uses a pull-out model, delivering dance instruction one day a week and encouraging students to understand broad concepts and theory while developing technical dance skills.<sup>160</sup>

---

<sup>156</sup> "Gifted Education at the Middle School Level." Virginia Beach Public Schools. Op cit.

<sup>157</sup> "Gifted Program Overview." Virginia Beach Public Schools. p. 3.

<http://www.vbschools.com/curriculum/gifted/Local%20Plan%20for%20the%20Education%20of%20the%20Gifted%202010-2015.pdf>

<sup>158</sup> "Gifted Education at the Middle School Level." Virginia Beach Public Schools. Op cit.

<sup>159</sup> Ibid.

<sup>160</sup> "Gifted Program Overview." Virginia Beach Public Schools. Op cit. p. 3.

## PROJECT EVALUATION FORM

Hanover Research is committed to providing a work product that meets or exceeds partner expectations. In keeping with that goal, we would like to hear your opinions regarding our reports. Feedback is critically important and serves as the strongest mechanism by which we tailor our research to your organization. When you have had a chance to evaluate this report, please take a moment to fill out the following questionnaire.

<http://www.hanoverresearch.com/evaluation/index.php>

## CAVEAT

The publisher and authors have used their best efforts in preparing this brief. The publisher and authors make no representations or warranties with respect to the accuracy or completeness of the contents of this brief and specifically disclaim any implied warranties of fitness for a particular purpose. There are no warranties which extend beyond the descriptions contained in this paragraph. No warranty may be created or extended by representatives of Hanover Research or its marketing materials. The accuracy and completeness of the information provided herein and the opinions stated herein are not guaranteed or warranted to produce any particular results, and the advice and strategies contained herein may not be suitable for every partner. Neither the publisher nor the authors shall be liable for any loss of profit or any other commercial damages, including but not limited to special, incidental, consequential, or other damages. Moreover, Hanover Research is not engaged in rendering legal, accounting, or other professional services. Partners requiring such services are advised to consult an appropriate professional.





1700 K Street, NW, 8th Floor  
Washington, DC 20006

P 202.559.0500 F 866.808.6585  
[www.hanoverresearch.com](http://www.hanoverresearch.com)

*This page intentionally left blank*

Kenosha Unified School District  
Kenosha, Wisconsin

March 25, 2014

**Report of Contracts in Aggregate of \$25,000**

School Board Policy 3420 requires that “all contracts and renewals of contracts in aggregate of \$25,000 in a fiscal year shall be approved by the School Board except in the event of an emergency as determined and reported to the School Board monthly by the Purchasing Agent.”

The contracts/agreements in aggregate of \$25,000 that have been added to the Contract Management Database subsequent to February 25, 2014, with approval of the purchasing agent are shown in the database in coral color. Board members may access this database while on district property.

[Link to Contract Management Database](#)

**Approval of Contracts in Aggregate of \$25,000**

The following contracts/agreements have not been added to the Contract Management Database are being presented to the Board at this time for Board Approval.

**Ellevation, LLC – English as a Second Language Software**

**1. What is the purpose of the proposed purchase?**

During the 2012-2013 school year, there were English as a Second Language leadership committees formed to help solidify a program for our English language learners in the Kenosha Unified School District. The English as a Second Language leadership committees have expressed numerous concerns regarding the amount of time spent on paperwork versus time for teacher collaboration and student instructional time. Currently, the average amount of time spent on initial paperwork is approximately 45 minutes per student. If each teacher services an average of 40 students, each teacher spends approximately 30 hours preparing initial paperwork for our English language learners. This time can be spent providing quality instruction to students and collaboration time with staff servicing Kenosha Unified School District's English language learners. The members of the committee began to research various programs to assist them with their monitoring activities and collaboration. The products researched included Ellevation, Imagine Learning, and the Berlitz CyberTeachers program. The programming committee found the Ellevation program to be the best fit for Kenosha Unified School District.

The Ellevation software provides English as a second language educators the tools to assist them with increasing productivity, improving teacher collaboration, and facilitating correspondence to parents by translating Title III paperwork into 29 different languages. This purchase of this software would ultimately give the English as a second language teachers more time to spend in the classroom with English language learners.

**2. What is the total cost of purchase and the funding source?**

The funding source would come from Title III Funds and would be approximately \$26,250.00.

**3. What is the educational outcome of this purchase?**

Ellevation will help educators collaborate and create goals for our English language learners. Ellevation will also assist the English as a second language teachers and general education teachers with monitoring the achievement of English language learners and will help with the continuous improvement process of our English language learners.

**4. When is the anticipated start date?**

July 1, 2014

**Solution Tree – Professional Learning Communities Institute Hybrid**

**1. What is the purpose of the proposed purchase?**

Kenosha Unified School District is proposing to partner with Solution Tree to host a Professional Learning Communities Institute Hybrid event for a second year. Professional Learning Communities (PLC) is a foundational piece of the district's Professional Learning Plan. By hosting a Professional Learning Communities Institute Hybrid, up to 160 participants will be able to experience the institute from a location in Kenosha. This learning opportunity will increase the number of Kenosha Unified School District staff able to experience the high-quality sessions at a savings of \$457.77 per participant.

**2. What is the total cost of purchase and the funding source?**

Professional Learning Institute – Lincolnshire, IL (three days)  
\$629.00 registration (including food) + \$123.77 mileage + \$752.77 per participant

**3. What is the educational outcome of this purchase?**

Staff members will gain additional knowledge and skills to build a professional learning community culture within their schools. This culture ensures learning becomes the focus of the work that addresses the

needs of all students systematically in learning environments that differentiate according to data. Instructional practice will improve through the collaboration of the team. Additionally, interventions for students will be focused and monitored to ensure academic growth.

From the evaluations of the 2013 Kenosha Hybrid event, 81% of participants had their expectations addressed. After the event, participants indicated that they would be using the information to develop SMART goals, discern/emphasize core standards, analyze student work for evidence of understanding, and focus on teaching for conceptual understanding.

**5. When is the anticipated start date?**

Planning and advertising would begin April 1, 2014

The event would occur August 4, 2014 and August 5, 2014.

Dr. Joseph Mangi  
Interim Superintendent of Schools

Mr. Tarik Hamdan  
Interim Chief Financial Officer

Mr. Robert Hofer  
Purchasing Agent

## PURCHASE/CONTRACT RATIONALE

Per School Board Policy 3420, please complete the following to be attached to your purchase order/contract. Additional information may be required and presented before the District's School Board for approval. Your submission must allow for adequate time for the Board to approve.

Vendor: **Ellevation, LLC**

Purchased Good/Program: English as a second language software

Start Date/Date Needed: July 1, 2014

### 1. PURPOSE – What is the purpose of the proposed purchase?

During the 2012-2013 school year, there were English as a second language leadership committees formed to help solidify a program for our English language learners in the Kenosha Unified School District. The English as second language leadership committees have expressed numerous concerns regarding the amount of time spent on paperwork versus time for teacher collaboration and student instructional time. Currently, the average amount of time spent on initial paperwork is approximately 45 minutes per student. If each teacher services an average of 40 students, each teacher spends approximately 30 hours preparing initial paperwork for our English language learners. This time can be spent providing quality instruction to students and collaboration time with staff servicing Kenosha Unified School District's English language learners. The members of the committee began to research various programs to assist them with their monitoring activities and collaboration. The products researched included Ellevation, Imagine Learning, and the Berlitz CyberTeachers program. The programming committee found the Ellevation program to be the best fit for Kenosha Unified School District.

The Ellevation software provides English as second language educators the tools to assist them with increasing productivity, improving teacher collaboration, and facilitating correspondence to parents by translating Title III paperwork into 29 different languages. This purchase of this software would ultimately give the English as a second language teachers more time to spend in the classroom with English language learners.

2. FUNDING – What is the total cost of purchase and the funding source?

The funding source would come from Title III and would be approximately \$26,250.00.

3. REQUEST FOR PROPOSAL (RFP) – indicate if an RFP has been completed

YES ☒

NO ☐ If no, please request an RFP packet

4. EDUCATIONAL OUTCOME – What is the educational outcome of this purchase?

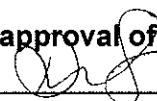
Ellevation will help educators collaborate and create goals for our English language learners. Ellevation will also assist the English as a second language teachers and general education teachers with monitoring the achievement of English language learners and will help with the continuous improvement process of our English language learners.

5. START DATE – When is the anticipated start date?

The anticipated start date would be July 1<sup>st</sup>, 2014.

**Your response does not establish approval of either a contract or a purchase order.**

Appropriate Leadership Signature



Date

3-18-2014

## PURCHASE/CONTRACT RATIONALE

Per School Board Policy 3420, please complete the following to be attached to your purchase order/contract. Additional information may be required and presented before the District's School Board for approval. Your submission must allow for adequate time for the Board to approve.

Vendor: Solution Tree

Purchased Good/Program: Professional Learning Communities Institute Hybrid

Start Date/Date Needed: August 4, 2014 and August 5, 2014 (two-day event)

### 1. PURPOSE – What is the purpose of the proposed purchase?

Kenosha Unified School District is proposing to partner with Solution Tree to host a Professional Learning Communities Institute Hybrid event for a second year. Professional Learning Communities (PLC) is a foundational piece of the district's Professional Learning Plan. By hosting a Professional Learning Communities Institute Hybrid, up to 160 participants will be able to experience the institute from a location in Kenosha. This learning opportunity will increase the number of Kenosha Unified School District staff able to experience the high-quality sessions at a savings of \$457.77 per participant.

#### Cost comparison per participant:

Professional Learning Institute- Lincolnshire, IL (three days)  
\$629.00 registration (including food) + \$123.77 mileage = \$752.77 per participant

Professional Learning Communities Institute Hybrid - Kenosha, WI (two days)  
\$265.00 cost per person + \$30.00 food = \$295.00 per participant

### 2. FUNDING – What is the total cost of purchase and the funding source?

\$42,400.00 - Cost of PLC Hybrid Program

Funding for this professional learning opportunity will be through Title IIA. This event will also be open to surrounding school districts at a per participant rate (paid to Kenosha Unified School District) to ensure that all 160 seats are filled. This will decrease the overall cost for Kenosha Unified School District.

### 3. REQUEST FOR PROPOSAL (RFP) – indicate if an RFP has been completed

YES ☐

NO ☒ If no, please request an RFP packet



4. EDUCATIONAL OUTCOME – What is the educational outcome of this purchase?

Staff members will gain additional knowledge and skills to build a professional learning community culture within their schools. This culture ensures that student learning becomes the focus of the work that addresses the needs of all students systematically in learning environments that differentiate according to data. Instructional practice will improve through the collaboration of the team. Additionally, interventions for students will be focused and monitored to ensure academic growth.


From the evaluations of the 2013 Kenosha Hybrid event, 81% of participants had their expectations addressed. After the event, participants indicated that they would be using the information to develop SMART goals, discern/emphasize core standards, analyze student work for evidence of understanding, and focus on teaching for conceptual understanding.

5. START DATE – When is the anticipated start date?

Planning and advertising would begin April 1, 2014

The event would occur August 4, 2014 and August 5, 2014.

**Your response does not establish approval of either a contract or a purchase order.**

Appropriate Leadership Signature  Date 3-17-2014

*This page intentionally left blank*

KENOSHA UNIFIED SCHOOL DISTRICT  
Kenosha, Wisconsin

March 25, 2014

**Disaster Recovery/ Data Archiving Technology Upgrade**

The Kenosha Unified School District is a very large organization with ever growing demands related to student, staff and operationally sensitive data. The responsibilities associated with this data covers educational value, management of resources and assets and critical employee information. The current backup option is limited in scope and is over six years old. Even with the emergence of external cloud (internet) storage utilization for some systems and files, the amount that requires internal management has grown exponentially over the last several years. If KUSD were to experience a catastrophic event, or similar data failure including major user error, the rough timeline to utilize the backup data would be 2 – 3 weeks as we currently do not have the device capabilities to implement the data into new systems. The Information Services Department is requesting to implement an adequate disaster recovery and data retrieval system for KUSD's critical information.

Several options were explored and we received valid quotes from different vendors. The recommendation is to accept a 3-year contract, starting July 1, 2014, which includes discounts from both a state rate and multi-year agreement if approved prior to the quote deadline. The estimated one-time amount for implementation is \$85,000 with a \$15,000 annual maintenance cost. If approved within this timeframe, KUSD would save over \$40,000. This new Disaster Recovery system would allow the use of VMware technology with "point in time" activation for recovery within a few hours, rather than weeks. The new system would also improve our capacity to adhere to the state expectations for record retention and management as a public entity. The Wisconsin Electronic Records Management Standards and Requirements regulation [WI Admin Provision 12.05 (4) and (11)] states that a public organization utilize information systems that accurately reproduce the records they create and maintain and utilize information systems that can export records that require retention to other systems without loss of meaning. Wisconsin records retention and archiving expectations vary, mostly from one to seven years, though some are expected to be permanent.

**Administrative Recommendation:**

Administration recommends that the Board approve of the Disaster Recovery and Data Archival budget assumption for fiscal year 2014-15.

Dr. Joseph Mangi  
Interim Superintendent of Schools

Kristopher Keckler  
Executive Director  
of Information & Accountability

James Hanrahan  
Operations & Applications Support  
Coordinator



## BUDGET ASSUMPTION SUMMARY - EXPENDITURE

Title: **IS Disaster Recovery/ Archiving Solution**

Budget Year: **2014-2015**

Department: **Information Services**

Budget Manager: **Kris Keckler**

### REQUEST

To increase the annual IS hardware and software allocation by approximately \$100,000 (one time setup of approximately \$85,000, with approximately \$15,000 recurring annual expenses).

### RATIONALE/ INSTRUCTIONAL FOCUS

The district's current Enterprise backup solution is 6 years old and no longer able to meet the needs of the current data environment. The amount of information and complexity of our systems has grown exponentially over the last few years. IS has worked to efficiently consolidate the growing student and staff data systems in the ESC datacenter and the required backups have out grown the capabilities of the current system. Recent improvements to the District's network infrastructure it is now physically and financially feasible to install a backup solution that also would help meet the state's document retention guide lines and also provide a faster and better level of recovery in the event of a major disaster to the current ESC Datacenter.

### IMPACT

This hardware/software solution will allow IS staff to reliably backup and restore all critical data and systems. It will give the IS staff the ability to quickly restore files for individual users creating less down time for staff and students. It will give the IS staff the ability to restore of entire systems in the event of a catastrophic disaster or major user error. We will be able to do "point in time" restores of files or systems to minimize the impact of any loss or corruption of data. It will allow us to have all of our backups replicated offsite. This solution would also give IS the ability to archive data that we currently do not have in place. It will also give us a true disaster recovery solution in the event we were to lose the current ESC Datacenter. We would be able to bring critical systems back online within hours at an offsite location.

### BUDGET ASSUMPTION

Object Level	Descriptive	Amount
8052664000-2361	Enterprise Class Backup / Archive solution	\$100,000.00
	<b>TOTAL</b>	<b>\$100,000.00</b>

\*Note: To re-calculate the Total Amount, click once in the Total Amount cell then press the F9 key.

Is this a ☒ one-time or ☒ recurring expenditure?

### FUNDING SOURCES

This main cost assumption would be a one-time allocation for the necessary components, with a smaller annual maintenance cost that will be added to the existing IS software maintenance budget.



March 25, 2014

### DONATIONS TO THE DISTRICT

The District has received the following donations:

1. Shirley Wilson donated 24 binders of past *Wood Smith* magazines to be used for content specific literacy reading articles. The value of this donation is unknown.
2. Bull and Bear Eatery donated \$500.00 to Grant Elementary School to support reading initiatives, parent engagement activities and classroom supplies.
3. Ohyama Lights donated 45 Edge-lit LED Panels to the Whittier Library. The value of this donation is \$6,750.00.

### Administrative Recommendation

Administration requests the Board of Education approve acceptance of the above listed gift(s), grant(s) or bequest(s) as per Board Policy 1400, to authorize the establishment of appropriate accounts to monitor fiscal activity, to amend the budget to reflect this action and to publish the budget change per Wisconsin Statute 65.90(5)(a).

Dr. Joseph Mangi  
Interim Superintendent of Schools

*This page intentionally left blank*

KENOSHA UNIFIED SCHOOL DISTRICT  
Kenosha, Wisconsin

March 25, 2014

**Tentative Schedule of Reports, Events,  
and Legal Deadlines for School Board**  
**March - April**

**March**

- March 11 14, 2014 – Standing Committee Meetings – 5:30 p.m. in ESC Board Room
- March 25, 2014 – Regular Board of Education Meeting – 7:00 P.M. in ESC Board Room

**April**

- April 8, 2014 – Standing Committee Meetings – 5:30 p.m. in ESC Board Room
- April 18-25, 2014 – Spring Recess – Schools Closed
- April 28, 2014 – Organizational and Regular Board of Education Meetings – 6:30 & 7:00 P.M. in ESC Board Room

Bd/ragtsr.doc