School Committee Meeting Materials

Regular School Committee Meeting

July 17, 2017
7:00pm
“Know Your Rights Under the Open Meeting Law, M.G.L. c.30A § 18-25 and City Ordinance Sections 2-2028 through 2-2033.”

July 14, 2017

REGULAR SCHOOL COMMITTEE MEETING
Notice is hereby given that the Salem School Committee will hold a Regular School Committee meeting on Monday, July 17, 2017 at 7:00 p.m. The meeting will be held in the School Committee Chambers at Collins Middle School, 29 Highland Avenue, Salem, MA.

AMENDED AGENDA

I. Call of Meeting to Order

II. Approval of the Agenda

III. Approval of Minutes
   a. Deliberation and Vote on the Minutes of the Regular School Committee Meeting held on June 19, 2017

IV. Questions and Comments from the Audience

V. Superintendent’s Report – Margarita Ruiz

VI. Presentation and Reports
    Carlton Innovation School Renewal Plan

VII. Public Hearing
    Carlton Innovation School Renewal Plan

VIII. Action Items
   a. Deliberation and Vote on the Renewal of the Carlton Innovation School Plan for a Term of Five Years, 2017 through 2022
   b. Deliberation and Vote on the Alumni Lacrosse Facility Use Fee Waiver Request
IX. **Finance Report**

a. **Approval of Warrants**
   
   June 29, 2017 in the amount of $600,227.04  
   July 13, 2017 in the amount of $2,055.00  
   July 20, 2017 in the amount of $279,923.89

b. **Budget Transfers**

X. **Subcommittee Reports**

**Policy Subcommittee**

a. **Deliberation and Vote on Policy 6406 Voting Method – Tabled from 6/19/17**

b. **Deliberation and Vote on the Second Reading of the Recommendation of the Policy Subcommittee on the Revisions to the Following Policies in the 3000-Policy Series:**

   3102 Financial Reports and Statement  
   3104 Fiscal Year/Budget Deadlines and Schedules  
   3201 Funding Proposals and Applications  
   3203 Gate Receipts and Admissions  
   3301 Accounting and Reporting  
   3302 Audits  
   3303 Procedures for Handling Cash Receipts  
   3304 Revolving Accounts  
   3402 Payment Procedures  
   3406 Expense Reimbursements  
   3407 Sales Calls and Demonstrations

c. **Deliberation and Vote on the Second Reading of the Recommendation of the Policy Subcommittee on the Creation of the Salem Public Schools Recyclable Material Policy**

XI. **School Committee Concerns and Resolutions**

XII. **Questions and Comments from the Audience**

Respectfully submitted by:

______________________________  
Angelica Alayon, Secretary to the  
Salem School Committee
Salem School Committee
Meeting Minutes
Monday, June 19, 2017

A regular meeting of the Salem School Committee was held on Monday, June 19, 2017 at 7:00 p.m. in the School Committee Chambers at Collins Middle School, 29 Highland Avenue, Salem, MA.

Members Present: Mayor Kimberley Driscoll, Dr. Brendan Walsh, Mr. James Fleming, Ms. Mary Manning, Mr. Patrick Schultz, Ms. Kristine Wilson, and Ms. Deborah Amaral

Members Absent: None

Others Present: Margarita Ruiz, Superintendent, Kate Carbone, Assistant Superintendent, Margaret Marotta, Assistant Superintendent, Kristin Shaver, Business Manager, Kelley Rice, Chief of Communications and Jill Conrad, Chief of Systems Strategy.

Call to Order
Mayor Driscoll called the Regular Meeting of the Salem School Committee to order at 7:00 p.m.

Approval of the Agenda
Dr. Walsh moved to approve the agenda as presented. Ms. Wilson seconded the motion. The Motion carried.

Approval of Minutes
Dr. Walsh moved to approve the Minutes of the June 5, 2017 regular School Committee meeting. Ms. Wilson seconded the motion. Mr. Fleming abstained. The Motion carried.

Questions and Comments From the Audience
Beth Kontos, President of Salem Teachers Union, 10 Colonial Road, Suite 12, Salem, MA, thanked everyone who donated to the Salem High School Food Pantry and clothing boutique. She thanked many people for their support, donations, and contributions including the Salem High School Principal David Angeramo for providing them with a room on the first floor which allowed easy access to students, students and their parents, the Mayor, School Committee members, Staff members, Families, Union Latina, National Honor Society, Alumni, Sororities, Dentists, and everyone who donated their services, supplies, baked goods, money, and food pantry items to Children’s Clothing Boutique. It has been a community activity where everyone got together to help.

Superintendent Report – Margarita Ruiz
Ms. Ruiz recognized the loss of a 5th Grade Carlton Innovation School student, Jaydon Dancy, who was tragically killed in an accident. She asked for a moment of silence in his honor. Superintendent Ruiz thanked the public for their outpouring of support and recognized Bethann Jellison, Principal at Carleton, Margaret Marotta, Assistant Superintendent, and Kelley Rice, Chief of Communications for their leadership during a very difficult time. The Superintendent congratulated the many students who participated in Moving On Ceremonies across the district. She thanked teachers, paraprofessionals, and staff members for their dedication and commitment so that every student could reach their full potential. Ms. Ruiz reminded members of the public that the district’s Food and Nutrition Services Department would be providing breakfast, lunch, and dinner for children under the age of 18 from July 6 through August 24, free of charge, as part of Salem Summer Meals. Meal schedule and locations can be found on the Salem District’s website.
Presentations and Reports

Mayor Presentation of City Seals
Mayor Driscoll provided City Seals to the following retiring educators of 2017: Jane Pace, Luz Barreto-Longus, Anne LeBlanc, Eleanor King, Elisa LaSota, Judy Johnson, Paul Loud, Christine Morin, Ruthann Hatt, Mary Sueltenfuss, Susan Ellis, and Paula Dobrow. They were recognized for serving the City of Salem and students in the Salem Public Schools and honored for time invested, dedicated services, and individual experiences each brought to the Salem schools.

Action Item

Deliberation and Vote on the Approval of Recommendation to Appoint Dr. Brendan Walsh as the School Committee Delegate to the 2017 MA Association of School Committees (MASC) Conference

Mr. Fleming motioned to approve the recommendation to appoint Dr. Brendan Walsh as the School Committee Delegate to the 2017 MA Association of School Committees (MASC) Conference. Ms. Amaral seconded the motion. The Motion carried.

Deliberation and Vote on the Recommendation to Have all Schools Participate in the Community Eligibility Program for Free Lunch in FY18

Discussion
Mr. Schultz informed School Committee members that the Finance Subcommittee voted unanimously to approve the recommendation. Currently, Witchcraft Heights and Saltonstall do not offer free and reduced lunch to all of their students, this could remedy that. The cost to the Food Program, over the course of FY18, will be about $50,000, but those costs should diminish over time with increasing reimbursements through the CEP Program. Mr. Schultz clarified that the budgets are separate; the $50,000 does not affect the school budget or any investment in Personnel or Programming in the School District. Mr. Fleming commented that they previously had a $300,000 deficit in the Food Program. They now have a $300,000 balance, which is where the $50,000 comes from. It would not come from taxpayer dollars this year or from the school budget.

Mr. Schultz motioned to approve the recommendation to have all schools participate in the Community Eligibility Program for free lunch in FY18. Mr. Fleming seconded the motion. The Motion carried.

Deliberation and Vote on the STU Request to Decrease Beth Kontos’ Teaching Load From .5FTE to .4FTE for the Remainder of Her Term as Union President

Discussion
Mr. Fleming said this particular move saves money. They now pay Ms. Kontos a .5 FTE of her salary and they are going to save .1%.

Mr. Fleming motioned to approve the STU request to decrease Beth Kontos’ teaching load from .5FTE to .4FTE for the remainder of her term as Union President. Ms. Wilson seconded the motion. The Motion carried.
Deliberation and Vote on the Superintendent’s Recommendation to Increase the Stipends for the Teacher-Led Professional Development Workshops

Discussion
Mayor Driscoll stated that this is a follow up of their discussion from the last meeting. Superintendent Ruiz handed a Memorandum to School Committee members. She said that they, at the request of the School Committee, took a look at the stipends being offered. The conversation was set at $300 for three sessions to be conducted, during half of the three All-Day Professional days next year. The recommendation is to double the amount to $600. They would need 40 PD sessions to be able to include all the teachers in the district. This doubling of the amount would equate to an increase of $12,000. Superintendent Ruiz recommends an approximate reduction total of $7,500 that will be made available through the reduction. They propose to use those freed up funds in addition to a request of $4,500 to be made out of the Dominion Account to complete the $12,000 needed for the request. Mayor Driscoll stated that would essentially mean they would have to approve up to $4,500 and the transfer out of Personnel to Professional Development or wherever else it will be used for the stipends. Ms. Manning wondered how they were doing on getting the 40 presenters. Ms. Carbone said they have them. They would be putting out a brochure to the teachers and ask them to select their first or second choice so they can identify the sessions going forward. Ms. Carbone clarified that they have several sessions that have multiple participants. It is $600 for the mini course. If it were one person, they would receive that $600. If it were multiple people, they would divide that across the facilitators. Mr. Fleming said they understand that despite who is splitting it, they know the upset limit to be $12,000. Ms. Carbone stated that it also includes a required summer get together to go over some guiding principles so that there is common structure across the workshops.

Mayor Driscoll said they could make the amount out of the Dominion Funding to be $5,000 in order to offer some refreshments for this get-together, which prevents from having to pay others for that. Dr. Walsh added he would offer that as a friendly amendment.

Mr. Fleming motioned to approve the utilization of $5,000 out of the Dominion Funds to help with Professional Development Stipends. Ms. Manning seconded the motion. The Motion carried. Mr. Fleming motioned to approve the transfer of $7,500 from Personnel to Stipends. Dr. Walsh seconded the motion. The Motion carried.

Deliberation and Vote to Approve the Superintendent’s Recommendation to Develop a Memorandum of Agreement With the YMCA to Operate the Teen Parent/SPS Child Care Program at Salem High School

Discussion
Ms. Ruiz recalled from the last meeting that the Teen-Parent program, run by Children Friends and Family Services at Salem High School, was scheduled to close as of June 30th, 2017. The loss of this program was concerning because it provided care for the children of their students and the provision of training for students in the Early Childhood and Care Vocational Program. The YMCA is interested and able to run an Early Education Program that would include infants, toddlers, and preschoolers at Salem High, using the same space that would be vacated by the Teen-Parent program. The YMCA Early Education Program at Salem High would be in operation throughout the year; it would not be on the school calendar but throughout the entire year. It would run from 7:00am to 6:00pm. Slots would be secured for students at Salem Public Schools who may need daycare for their children. They would like to offer this daycare opportunity not only to teachers at Salem High School but also to other teachers across the district. Mr. Fleming asked if this is subject to, and if notice should be put out for, competitive bidding. Mayor Driscoll said they may have not looked into the Procurement issue and could take a look
at it. Mr. Fleming asked if they could ask their School Attorney about that. Mayor Driscoll agreed. Dr. Walsh was pleased that the Early Education Program would continue to be offered. He agreed with Mr. Fleming on competitive bidding and asked School Committee members if they thought it should be tabled to the next meeting. Mayor Driscoll suggested they approve it subject to a review of the Procurement issue. Ms. Amaral mentioned that if they are going to look into the procurement issue, they might also want to look at how long the extended day program has been run under contract at the Early Learning Center.

Dr. Walsh motioned to approve the Superintendent’s Recommendation to develop a memorandum with the YMCA operating team Child Care Program at Salem High School subject to review of compliance with All State Procurement Laws. Ms. Manning seconded the motion. Ms. Amaral abstained. The Motion carried.

Deliberation and Vote on Annual Salary Increases for Non-Union Senior Management Team Members

Discussion
Mr. Schultz informed members that both Personnel and Finance Subcommittees spoke about this at length. Mr. Fleming expressed concerns on whether the Superintendent’s recommendation to increase the Executive Assistant and Director of Human Capital’s pay fell in line with other Administrative Assistants in the district. He gave members additional details of his findings, expressed his thoughts on the expanded size of the HR Staff and the Director’s short period of time in her position. He would not be able to vote in favor of this particular recommendation unless there is a modification/amendment to the recommendation. He hoped the School Committee would hold off on the Superintendent and Assistant Superintendent’s raises for one year. He asked members to consider amending the motion of adopting all of the Superintendent’s recommendations. Mr. Fleming gave a brief explanation on the Superintendent current office expenditures, could not support the recommendation, and asked for a modification in terms of the Administrative Assistant, Assistant Superintendent, and Director of Human Capital, in the manner in which he has described. Mr. Schultz, for clarification, asked Mr. Fleming if he was in support of everything below the name Ms. Bento on the list that consists the entire Principal raises. Mr. Fleming said that he gave his authorization to announce his support of the Principal at the last meeting. Mr. Fleming said there is one minor change; the Principal of Saltonstall recently received his Doctorate. The Superintendent asked for another percentage from 4 to 5%, which he also supported. Ms. Manning stated that Mindy Marino should be considered for a raise for the work that she does, her talent, and her work efforts. Dr. Walsh shared his concern on the amount of money they have been spending in Central Administration. He would vote for the increase for those on the field, namely the Principals. He is not sure he would be in favor of the increase to Central Administration who do have a 2.5% increase. He could vote for the bottom half of the list. Ms. Amaral commented on the great deal of improvement and supports the increases, as requested. Mr. Schultz said they looked at this with both Finance and Personnel Subcommittees and have been given rationales for the increases. Mr. Schultz stated this is an opportunity to pay their district leaders based on performance and in light of regional and statewide comps. He believes in the thoughtfulness of the Superintendent and that she knows the value and hours of work of the Central Office staff. She also knows they work within a tight budget. He weighs their value versus the overall budget and he trusts her assessment of that. Mr. Schultz continued his view that pay must be paid appropriately if they are going to continue to improve as a district. Mr. Fleming reaffirmed his opposition to the four positions mentioned earlier and further explained his reasons and fairness as to why. Ms. Manning shared that she can understand Mr. Fleming’s point on the amounts of Central Office in the list. It is difficult for her to be supportive of this list as she is aware that there are a great many others who also contribute to the overall goals; there are many more people involved than what is mentioned. Dr. Walsh agreed, job performance expectations are based according to job responsibilities.
These are being brought forth as merit raises for performing over and above expectations. He did not think they should be looking for additions to their Central Office staff when it is not done for others who are on the actual field every day. Ms. Manning shared that she has seen a positive turnaround, see many things in place, and understand the work involved in getting a lot of that done. She commented that one does not automatically get a merit raise every year because of good work alone, good work is expected. She can see the huge effort that has been put in within the last year or two. She would really like to see it continue with the same staff. Mayor Driscoll stated that all of the increases is built into the FY18 budget they recently approved; they would not need additional funding to pay for this. She would also like to parent and compensate teachers more. They look at what other teachers are making and are trying to get that salary survey up in order to properly compensate all Salem teachers with what they deserve. Mayor Driscoll continued addressing School Committee members and stated she would love for them to be able to advance this, this evening. Further discussion ensued. Mayor Driscoll motioned to approve the Recommendation for the seven individuals named out of the Senior Management team (those listed above the list of Principals) as recommended by the Superintendent. Mr. Fleming called for a Roll-Call Vote.

**School Committee Secretary Roll Call:**

<table>
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<tr>
<th>Name</th>
<th>Vote</th>
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<tbody>
<tr>
<td>Mr. James Fleming</td>
<td>No</td>
</tr>
<tr>
<td>Ms. Deborah Amaral</td>
<td>Yes</td>
</tr>
<tr>
<td>Ms. Mary Manning</td>
<td>Yes</td>
</tr>
<tr>
<td>Mr. Patrick Schultz</td>
<td>Yes</td>
</tr>
<tr>
<td>Dr. Brendan Walsh</td>
<td>No</td>
</tr>
<tr>
<td>Ms. Kristine Wilson</td>
<td>Yes</td>
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<tr>
<td>Mayor Kimberley Driscoll</td>
<td>Yes</td>
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</tbody>
</table>

7 Members voted. 5 in the **affirmative**, 2 in the **negative.** Ms. Manning’s ‘Yes’ vote was for this year. The Motion carried.

Dr. Walsh motioned to approve the additional increase for Saltonstall School Principal Nicholas Gesualdi to reflect his Ph.D. Mr. Fleming seconded the motion. The Motion carried.

**Deliberation and Vote on the Approval of the Regular School Committee Schedule for July 1, 2017 – June 30, 2018**

**Discussion**

Mr. Fleming referred to July 24th date on the list. He has a prior commitment on the 24th and asked it please be moved up to July 17th. Ms. Amaral said she would not be available on that date but would be more than happy to call in (face time). All members agreed that the rest of the dates are fine.

Mr. Fleming motioned to approve the Amended Regular School Committee Schedule for July 1, 2017 through June 30, 2018, exception being that July 24th be moved up to July 17th, 2017. Ms. Amaral seconded the motion. The Motion carried.

**Student Assignment Policy**

**Discussion**

Members agreed to meet for a Committee of the Whole (COW) meeting on July 13, 2017 at 5:00pm to begin discussion the Student Assignment Policy process. Ms. Amaral motioned to approve a COW meeting for July 13, 2017. Ms. Manning seconded the motion. The Motion carried.
Finance Report

a. Approval of Warrants

June 15, 2017 in the amount of $196,627.49

Mr. Fleming motioned to approve the warrant as stated. Ms. Amaral seconded the motion. The motion was approved.

June 22, 2017 in the amount of $313,278.16

Mr. Fleming motioned to approve the warrant as stated. Ms. Wilson seconded the motion. The Motion was approved.

b. Budget Transfer Requests FY17-28

School Business Administrator, Kristin Shaver explained that Central Office (Teaching and Learning) has requested that the fund be transferred in order to align the funds with the intended expense as follows:

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<thead>
<tr>
<th>Account Description/Use</th>
<th>Account Number</th>
<th>Amount From</th>
<th>Amount To</th>
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<tbody>
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<td>Athletic Equipment</td>
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<tr>
<td>Rental and Lease</td>
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<tr>
<td>Contracted Services</td>
<td>13490141 5320</td>
<td>2,416.00</td>
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<tr>
<td>Books – Library</td>
<td>13570521 5512</td>
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<td>Instructional Supplies</td>
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<td>Textbooks</td>
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<tr>
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<td>Tuition</td>
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<td>Legal Services</td>
<td>13252030 5303</td>
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<tr>
<td>Pupil Transportation</td>
<td>13570141 5333</td>
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<td>Office Supplies</td>
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<td>Special Education Transportation</td>
<td>13640181 5332</td>
<td>147,406.48</td>
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Ms. Amaral moved to approve the End-of-Year budget transfer request transferring to Pupil Transportation, Office Supplies, and Special Education Transportation. Ms. Wilson seconded the motion. The Motion was approved.
Subcommittee Reports

Policy Subcommittee

Deliberation and Vote on Policy 6406 Voting Method – Tabled from 6/5/17

Policy 6406 remains tabled.

Deliberation and Vote on the First Reading of the Recommendation of the Policy Subcommittee on the Revisions to the Following Policies in the 3000-Policy Series

Discussion

The Policy Subcommittee met to review the policies in the 3000s on the School Committee Policy manual. The Chair of the Policy Subcommittee, Ms. Amaral, mentioned the following policies that were reviewed with no recommended changes:

Policy 3101 Budget Planning has no changes and recommended to leave as is.
Policy 3202 has already gone through three readings.
Policy 3206 Revenues and Tax Sources – no changes
Policy 3306 Bond and Police Officers – no changes.
Policy 3401 Purchasing and Purchasing Authority– no changes.
Policy 3403 Corporate Purchasing - shows blank on the spreadsheet but no changes.
Policy 3405 Depository Funds Authorized Signatures – no changes.

The Subcommittee reviewed the following policies, presented for the First Reading this evening. These are listed below with member discussions, if any. Proposed changes are found in the meeting materials under “track changes”.

Policy 3102 Financial Reports and Statement – no substantial change, just language change. Dr. Walsh had asked that the Business Manager and not the Superintendent submit all financial reports, as she is the person responsible for those and said he believes Ms. Amaral has made that change.

Policy 3104 Fiscal Year/Budget Deadlines and Schedules

Policy 3201 Funding Proposals and Applications

Policy 3203 Gate Receipts and Admissions

Policy 3301 Accounting and Reporting - no substantial changes
Mayor Driscoll read the description changes for Policy 3301. Ms. Amaral further clarified the change. Mr. Fleming stated that the wording should be “…the Superintendent, with the approval of the School Committee, should be responsible for the administration of the budget”. Dr. Walsh said they could consider adding “…for administration of the approved budget”. Members agreed to hold off on this policy. This is the First Reading. Mr. Fleming would support the First Reading as long as the review of the language is made for the second reading. Policy 3301 is scheduled for a Second Reading at the next Regular School Committee meeting. Ms. Amaral said she would review and make the changes that Mr. Fleming requested on the policy.

Policy 3302 Audits

Policy 3303 Procedures for Handling Cash Receipts
Policy 3304 Revolving Accounts

Policy 3402 Payment Procedures – to have a new allowance for them to have one signature on the Warrant – each year they would designate someone to approve it. Their suggestion is the Mayor as a designee of the School Committee. They would have to vote on them. The Superintendent and Business Manager would still have to attest to the accuracy of the Warrants – Warrant will remain available at the Business Office and they would vote on them.

Policy 3406 Expense Reimbursements

Policy 3407 Sales Calls and Demonstrations

Dr. Walsh motioned to approve the Policy changes as submitted by the Chairperson Policy Subcommittee for First Reading. Ms. Wilson seconded the motion. The Motion carried.

Deliberation and Vote on the First Reading of the Recommendation of the Policy Subcommittee on the Creation of the Salem Public Schools Recyclable Material Policy

Discussion
Ms. Amaral said they do not have a Recyclable Material policy. They are seeking an Environmental Protection grant and would need a policy to go with it. The suggestion is that this policy is number 3508, which fits well under Buildings and Grounds. The recommended language they added is to recognize recycling by looking at ways to include composting. Most schools have recycling; this would be a recognition of a District policy in support of recycling.

Dr. Walsh motioned to approve the First Reading of the Recommendation of the Policy Subcommittee on the Creation of the Salem Public Schools Recyclable Material Policy. Ms. Wilson seconded the motion. The Motion carried.

School Committee Concerns and Resolutions
Mr. Fleming would like the Administration to look again at the non-renewal of a History teacher at the Salem High School. He received some letters relative to that non-renewal. Her contribution to the High School has been fairly substantial and he would like the Administration to look again at the non-renewal. Dr. Walsh said he supports Mr. Fleming’s request. All School Committee members agreed.

Dr. Walsh shared that he was deeply struck outside of St. James Church by the informal (as they were not in dress uniforms) by the self-assembled Honor guards of both police and firefighters honoring the Carlton Innovation School student who passed away, Jaydon Dancy. He thanked them for what they did. Dr. Walsh commented that he was absent at the last meeting, and informed members that this year’s graduating senior, awarded the Giving Tree Award at the Senior Awards night, at the Salem High School was Taylor O’Leary.

Questions and Comments From the Audience
There were no questions or comments from the audience.
Adjournment

There being no further business to come before the School Committee this evening. Dr. Walsh entertained the motion to adjourn. Ms. Amaral seconded the motion. The meeting was adjourned.

Respectfully submitted by:

________________________
Angelica Alayon, Secretary
Salem School Committee

Meeting Materials and Reports

• School Committee Agenda June 19, 2017
• Minutes of the June 5, 2017 Regular School Committee Meeting
• List of SPS Staff Retirees Summer 2017
• Superintendent’s Recommendation Regarding the Teen Parent Program/Salem High School Early Education Program
• Regular School Committee July 1, 2017-June 30, 2018 Schedule
• Policy 6406
• Policies in the 3000-Policy Series
• Recyclable Materials Policy
• FY17-28 Budget Transfer Request
Carlton Innovation School
Continuous Progress Plan

INNOVATION RENEWAL PLAN
2017-2022
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Proposed Innovation School Name: Carlton Innovation School

New/Conversion/Academy within a school: Conversion – Renewal Plan

Proposed School Address (if known): 10 Skerry Street
Salem, MA 01970

Lead Applicant Name: Bethann Jellison, Principal

Lead Applicant Phone Number(s): 978-740-1280

Lead Applicant Fax Number(s): 978-740-1283

Lead Applicant Email Address: bethannjellison@salemk12.org

Proposed Innovation School opening school year: ☑ 2017-18

Proposed duration of innovation plan (up to five years): □ 3 years □ 4 years ☑ 5 years

<table>
<thead>
<tr>
<th>School Year</th>
<th>Grade Levels</th>
<th>Total Student Enrollment</th>
<th>Total number of Staff</th>
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<tbody>
<tr>
<td>First Year (2017-18)</td>
<td>K-5</td>
<td>270</td>
<td>42.1</td>
</tr>
<tr>
<td>Second Year (2018-19)</td>
<td>K-5</td>
<td>290*</td>
<td>43.1*</td>
</tr>
<tr>
<td>Third Year (2019-20)</td>
<td>K-5</td>
<td>290*</td>
<td>43.1*</td>
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<tr>
<td>Fourth Year (2020-21)</td>
<td>K-5</td>
<td>290*</td>
<td>43.1*</td>
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<tr>
<td>Fifth Year (2021-22)</td>
<td>K-5</td>
<td>290*</td>
<td>43.1*</td>
</tr>
</tbody>
</table>

* Estimated enrollment and staff
## INNOVATION PLAN CERTIFICATION STATEMENT

<table>
<thead>
<tr>
<th>Proposed Innovation School Name:</th>
<th>Carlton Innovation School</th>
</tr>
</thead>
<tbody>
<tr>
<td>Proposed City/Town Location:</td>
<td>Salem, MA</td>
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</table>

Names of innovation plan committee members (no more than 11 individuals) selected in accordance with state law:

<table>
<thead>
<tr>
<th>Affiliation</th>
<th>Name</th>
<th>Vote (yes or no)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lead applicant:</td>
<td>Bethann Jellison, Principal</td>
<td></td>
</tr>
<tr>
<td>Superintendent or designee:</td>
<td>Jill Conrad, Chief of Systems Strategy</td>
<td></td>
</tr>
<tr>
<td>School committee member or designee:</td>
<td>Dr. Brendan Walsh, Chair of Curriculum Sub-Committee, Salem School Committee</td>
<td></td>
</tr>
<tr>
<td>Parent who has one or more children enrolled in the school, or in the case of a new school, in the district:</td>
<td>Richard Thornett, Parent</td>
<td></td>
</tr>
<tr>
<td>Teacher employed by district (selected from among volunteers)</td>
<td>Tracy Angeramo, Math Teacher</td>
<td></td>
</tr>
<tr>
<td>Teacher employed by district (selected from among nominees submitted by the local teacher’s union)</td>
<td>Meredith McKenna, Salem Teacher’s Union representative</td>
<td></td>
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<tr>
<td>Member:</td>
<td>Kelly Miskis, Special Education Teacher</td>
<td></td>
</tr>
<tr>
<td>Member:</td>
<td>Alexandria Pineros-Shields, Parent</td>
<td></td>
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<tr>
<td>Member:</td>
<td>Shawna Erps, Reading Teacher</td>
<td></td>
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<tr>
<td>Member:</td>
<td>Kerry Murphy, Parent</td>
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<tr>
<td>Member:</td>
<td>Carolyn Townsend, Teacher</td>
<td></td>
</tr>
<tr>
<td>Member:</td>
<td>Joseph Loux, Parent</td>
<td></td>
</tr>
<tr>
<td>Member:</td>
<td>Gina Grinarml, Parent</td>
<td></td>
</tr>
</tbody>
</table>

I hereby certify that the information submitted in this innovation plan is true to the best of my knowledge and belief and has been approved by a majority vote of the innovation plan committee.

Signature of Lead Applicant Member _____________________________ Date________
I. EXECUTIVE SUMMARY

Introduction

The Carlton Innovation School was formed in 2012 following the approval of our innovation plan. The innovation plan was developed by former principal Jean-Marie Kahn and other members of the team and was widely supported and adopted as a way to improve the low student performance at the Carlton at the time. The innovation plan introduced a new model for enrolling, teaching, and transitioning students from one grade level to the next on a trimester basis, aligned to each student’s level of mastery of the standards and individual learning needs. This model became known as the “Continuous Progress Model” and centers on two key foundational elements:

1. **A Redesigned Instructional Delivery System based on Continuous Progress.** The school uses a trimester transition system as its key innovation. By accepting Kindergarten students at three (3) different points in the year (Fall, Winter, and Spring) based on the timing of a child’s 5th birthday, and then transitioning all students to the next grade level when ready, the school seeks to tailor instruction to each student. Some students spend more than one year in a particular “grade level” while other students spend less. A slew of autonomies and flexibilities are utilized to support this delivery system such as in the area of staffing: The total number of staff members able to deliver small group instruction within the school is increased by hiring utilizing and deploying teachers and other staff differently than most elementary schools do. In the area of schedule and calendar, by building in thematic, hands-on learning and projects during “enrichment blocks” one day per week (e.g., “Wacky Wednesdays”), core academic teachers gain additional common planning time to support the intensive review of student data and instructional planning required.

2. **Intensive, Standards-based and Student-centered Instruction.** Within the above structure, teachers are able to deliver more intensive instruction and support for learning across all subjects. Teachers use frequent assessments and student data to assign students to small groups. Working within the small-group framework, teachers are able to conduct frequent formative assessments, increased daily common planning time, and use data to continuously diagnose each student’s individual levels of mastery against each standard. Learning is personalized in a variety of ways. Teachers at the Carlton are actively engaged in curriculum development, assessment design, and in developing inquiry- and project-based approaches to science and other subjects. As a result, students are more engaged in their learning and enjoy their time at school.

A core set of autonomies and flexibilities in the areas of curriculum and instruction, schedule and calendar, staffing, professional development, district policies and procedures, and budget have supported this model. After five years of successful implementation, the Carlton Innovation School seeks to renew its innovation plan for an additional five years with some modifications as described below.

**Mission, Vision, Statement of Need, and Proposed Partnerships**

The mission of the Carlton Innovation School is to meet the needs of each individual student in a systematic and rigorous manner using a continuous progress approach to learning. The vision of the Carlton Innovation School is to provide intensive, personalized instruction that supports students’ continuous progress and learning at their own pace to achieve academic and social-emotional growth and mastery of standards. The structure of the Carlton Innovation School challenges traditions in order to provide the most flexible and personalized education possible.
The original innovation plan was developed in response to the school’s low levels of performance. The focus was to transform teaching and learning and results for all students at the school through an innovation plan that centered on two key foundational elements: 1) a redesigned instructional delivery system based on “continuous progress; and 2) intensive, standards-based and student-centered instruction that supports each student learning at their own pace. This model became known as the “Continuous Progress” model and over the past five years has not only demonstrated success in raising achievement at the school, but served as a resource for effective standards-based practices within the district. Over the past five years, the school has increased its ranking from the 6th percentile in 2012 to the 34th percentile in 2016, earning Level 1 status in 2016-17. Enrollment has increased at the school as well, reflecting an increased demand for this school among Salem families.

Looking ahead, the Carlton Innovation School seeks to shift from a “start-up” mode in its innovation to a focus on sustaining the continuous progress model within the district. We believe that the Carlton Innovation School by continuing to incubate and catalyze innovative practices, serves a key role within Salem. As the district moves forward with its strategic plan, it seeks to create a “vibrant teaching and learning ecosystem” that prioritizes standards-based, personalized, and student-centered learning across all schools and classrooms. As a pioneer in this area, we seek to continue serving as a “laboratory” for these practices within the district. We hope to strengthen our own practice and work with the district to support the replication and/or expansion of these types of practices throughout the district.

The school has benefitted from multiple partnerships with key institutions and organizations but most of all, Carlton benefits from a strong group of parents who have invested themselves in the school. The level of parent engagement, support, and involvement has risen dramatically in recent years and parents actively support the school in a variety of ways. A strong corps of teachers also serve as key partners for the school.

**Defining the Continuous Progress Model**

The Carlton community defines the “Continuous Progress Model” through features that align to the school’s structure and “instructional delivery system” as well as the instructional practices used. Table I, below provides an overview of the key features of our model.

**Table I: Key Features of the Continuous Progress Model**

<table>
<thead>
<tr>
<th>Instructional Delivery System</th>
<th>Instructional Practices</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Trimester enrollment for Kindergarten students</td>
<td>• Whole-child philosophy valued and student learning matched to social-emotional development of the child</td>
</tr>
<tr>
<td>• Students progress at their own pace – some needing more time, others accelerated</td>
<td>• Instruction matched to student’s achievement level, every day</td>
</tr>
<tr>
<td>• Multi-age classrooms with trimester transitions</td>
<td>• Workshop model with intensive and targeted small group instruction used for core subjects of reading, writing, and math</td>
</tr>
<tr>
<td>• Frequent use of small group instruction with students assigned flexibly (sometimes weekly) to groups based on their individual learning goals and needs</td>
<td>• Frequent and intensive assessments used daily to drive instructional decisions – especially teacher observations and student work along with common assessments</td>
</tr>
<tr>
<td>• Teachers work in teams and are deployed in flexible ways to “flood classrooms” with academic specialists to provide small group instruction in ELA and Math</td>
<td>• Standards-based continuums of learning used to level each team</td>
</tr>
<tr>
<td>• School structures such as schedule and calendar support intensive teacher collaboration and common planning time to help teachers assess and discuss students’ daily progress and needs</td>
<td>• Science and social studies taught using inquiry- and project-based methods</td>
</tr>
<tr>
<td>• Science and social studies taught using inquiry- and project-based methods</td>
<td>• Instruction emphasizes active and authentic student learning, student discourse, writing, thinking, and problem solving</td>
</tr>
<tr>
<td>• Instruction emphasizes active and authentic student learning, student discourse, writing, thinking, and problem solving</td>
<td>• Students are highly engaged as individual learners</td>
</tr>
<tr>
<td></td>
<td>• Students develop an awareness of his/her strengths and take ownership of their own learning</td>
</tr>
<tr>
<td></td>
<td>• Opportunities for extended learning for targeted students available through Success Block</td>
</tr>
</tbody>
</table>
Three other aspects of our model are important to understand:

1. **School Structure.** Carlton teaching teams are organized through multi-age cohorts (P1, P2, E1 and E2) instead of traditional grade levels, K-5. Students spend anywhere from two to nine trimesters in each cohort, depending on their learning needs. Table III on page 20 provides more detail.

2. **Trimester Enrollment Patterns and Procedures.** Kindergarten students enter and are enrolled three times per year – Fall, Winter, and Spring – in line with the school’s Trimester system and the timing of the child’s 5th birthday. This gives students the opportunity to start kindergarten early and the flexibility to spend additional time or to be accelerated before moving onto 1st grade. Open spots for new Kindergarten students are created when Kindergartners who are ready transition to the P2 cohort to begin the equivalent of 1st grade. At the other end of the spectrum, students who transition to the equivalent of 5th grade in E2 earlier than a traditional student would, may complete the requirements and mastery of 5th grade prior to the end of their final year at the school. For these students, a Flex Teacher is deployed to continue supporting these students’ accelerated learning. Table IV, V, and VI on pages 22-23 provides more detail.

3. **Transitioning Students.** Students who reach the minimum transition age and have mastered the required standards for a specific cohort are eligible to transition to the next cohort. Transitions occur at the end of each trimester. Teams of teachers confer to determine each student’s readiness and parents are also involved. Students present their learning within their current cohort as well as their goals for the next, providing their own rationale for moving ahead.

Two case studies are shared on pages 22-23 to illustrate these features of the Continuous Progress Model. When implemented together, these elements have proven a successful approach to accelerating student achievement for our students.

**Summary of Autonomies and Flexibilities**

As we look to renew our innovation plan for the next five years, the Carlton Innovation School seeks the following autonomies and flexibilities to continue supporting our successful model.

**Table II: Summary of Autonomies and Flexibilities Requested**

| Curriculum, Instruction, and Assessment | • The autonomy to develop and/or select our own curriculum  
• The autonomy to continuously use data to monitor student progress and use flexibility to place students in multi-aged, small groups across subjects based on their specific learning needs – as opposed to occasional groupings and differentiated instruction with one teacher  
• The autonomy to create our own standards-based report card  
• The autonomy to personalize learning by engaging students as individual learners  
• The autonomy to create school-wide enrichment opportunities through thematic units of study and student-centered activities  
• The autonomy to develop and implement student assessments that are aligned to the standards, curriculum, and support teachers’ ability to determine the extent to which each student has mastered the standards  
• The autonomy for teachers to work collaboratively to assess each students’ mastery of the standards and determine their readiness to transition from one grade level to the next at three different points in the year – as opposed to traditional grading practices and timelines  
• The autonomy to transition and/or matriculate students from one grade-level to the next when they are ready, based on each student’s demonstrated mastery of learning the standards for that grade level – as opposed to the traditional matriculation schedule where students transition to the next grade in the fall each year  
• The autonomy to identify, select, and utilize technology and other tools to support the continuous progress model  
• The autonomy to, if approved by the Commissioner, administer MCAS to students within a timeframe that aligns to their mastery of grade-level expectations |
## Schedule and Calendar

- The autonomy to establish the school’s daily schedule for students and teachers as needed
- The autonomy to establish the school’s own schedule and calendar for teacher professional development
- The autonomy to establish a schedule with increased common planning time for teachers
- The autonomy to establish the school’s schedule and calendar independent of the school district following the process outlined below
- The autonomy to request additional time from teachers in order to participate in the assessment camp, Success Block, and other activities taking place outside of the school schedule and calendar (teachers will be compensated accordingly)

## Staffing

- The autonomy to create new roles and job descriptions to support the implementation of the innovation plan (also agreed to with the 2013 Memorandum of Agreement with the STU)
- The autonomy to hire and deploy an additional set of teachers in special roles (such as additional academic specialist roles) to implement simultaneous strands of small-group and individualized instruction throughout the day
- The autonomy to deploy all teachers (core elementary, academic specialists, and specials teachers) in flexible ways to support ongoing small group instruction as well as daily common planning time
- The autonomy to allow for up to 10 staff members to voluntarily participate in assessment camp for a stipend of $1,200. If more than 10 teachers choose to participate the 10 will be selected based on seniority.
- The autonomy to pay teachers to work extra hours for “Success Block” tutoring, (teachers commit for a full trimester) at the forty-five dollar ($45.00) hourly rate

## Professional Development

- The autonomy to design and schedule our own calendar and focus for teacher professional development
- The autonomy to attend district professional development or to utilize district professional development time for our own specific needs.
- The autonomy to schedule professional development that may be different from the district to allow for the differentiation of staff needs regarding curriculum and assessment.

## District Policies and Procedures

### Governance

- The autonomy to establish a leadership team who will work closely with the school council and principal to establish goals for the school

### Student Assignment/Kindergarten Enrollment

- The autonomy to enroll Kindergarten students in three trimester “waves” based on the timing of their 5th birthday (before September 1 for the Fall Trimester, before December 1 for the Winter Trimester, and before March 1 for the Spring Trimester) -- as opposed to one enrollment period for the full kindergarten class in the fall (partial autonomy to SC Policy 5103)

### Grading, Student Promotion and Matriculation

- The autonomy to transition and/or matriculate students from one grade-level to the next when they are ready, based on each student’s demonstrated mastery of learning the standards for that grade level – as opposed to the traditional matriculation schedule where students transition to the next grade in the fall each year
- The autonomy for teachers to work collaboratively to assess each students’ mastery of the standards and determine their readiness to transition from one grade level to the next at three different points in the year – as opposed to traditional grading practices and timelines

### Student and Faculty Handbook

- The autonomy to create our own student and faculty handbooks

## Budget

- The autonomy to receive an annual, “lump sum budget” that is based on the 2017-18 approved budget, enrollment, and staffing levels
- The autonomy to have the “lump sum” budget adjusted each year based on the school’s future-year enrollment projections. Enrollment projections shall be based on the previous year’s average enrollment, October and April.
- The autonomy to collaborate with the district to identify potential discretionary services
that the school may “opt out of” in exchange for additional budget dollars

- The autonomy to allocate the school’s lump sum budget to support and sustain the school’s staffing model as determined annually by the school’s principal and leadership team.
- The autonomy to budget based on teachers’ actual salaries
- The autonomy to allocate funds to support additional teacher stipends for extra time and participation in the assessment camp, Success Block, Leadership Team or other purposes as needed.
- The autonomy to raise and spend funds from grants, private foundations, and third-party sources
- The autonomy to establish a 501-c-3 nonprofit organization to, among other things, serve as a fundraising arm for the long-term sustainability of the school
- The autonomy to retain (carry over) unspent funds from one fiscal year to the next

Capacity of Applicant Group and Measurable Annual Goals (MAGS)

Resumes of the lead and other key applicants are included in the appendix. In addition, an outline of the Measurable Annual Goals (MAGS) against which we will measure our success is included in the appendix.

II. PUBLIC STATEMENT

The Carlton Innovation School in Salem, Massachusetts educates students in grades K-5 with a building capacity of 300 students. The school is based on student-centered learning within a trimester structure that accommodates “continuous progress.” Teachers emphasize a personalized approach to teaching and learning tailored to each individual student’s needs. Students who demonstrate mastery at their grade level, transition to the next level three times per year, at the trimester mark. The amount of time spent at each grade level depends on each student’s needs – with some spending less than one year and others spending more. As a result, students can accelerate to the next grade based on academic abilities, social emotional benchmarks, and or age.

III. MISSION, VISION, STATEMENT OF NEED, AND PROPOSED PARTNERSHIPS

A. Mission Statement

The mission of the Carlton Innovation School is to meet the needs of each individual student in a systematic and rigorous manner using a continuous progress approach to learning. Students succeed because their academic needs are met according to their individual progress along a learning continuum. By placing importance on the individual student, as opposed to classroom cohorts, students receive diagnostic instruction on a daily basis, resulting in greater academic achievement. Students exhibit the core values of community, curiosity, and effort allowing them to take ownership of their learning and to become active participants in their learning trajectory.

B. Vision Statement

The vision of the Carlton Innovation School is to provide intensive, personalized instruction that supports students’ continuous progress and learning at their own pace to achieve academic and social-emotional growth and mastery of standards. The school’s structure supports the individualized teaching of each student, ensuring his or her continuous academic progress. Students and teachers work with intention, purpose and cognitive clarity. By using a multi-age approach, without grade level distinctions, students progress at a developmentally appropriate rate that is individualized in nature. Students receive intensive instruction in reading, writing, math, and science that is explicitly driven by the assessment and instruction cycle. The school also embraces a multi-disciplinary and inquiry-based approach to science and social studies, which incorporates the core subjects of reading, writing and math. Continuous Progress teaching is
achieved through collaboration among teams of teachers and students working towards growth and mastery.

C. Statement of Need

In 2011, when the original Innovation Plan was proposed, the Carlton Elementary School faced numerous challenges including a high-level of leadership turnover (three principals over a six-year span) and low levels of student performance. More than three quarters of our school’s students were unable to read, write, or perform mathematical skills at grade level. To prevent further declines, Jean-Marie Kahn, our newly appointed principal at the time, worked together with the staff and a group of parents to develop the original innovation plan as a way to transform teaching and learning and results for all students at the school. The original innovation plan centered on two key foundational elements: 1) a redesigned instructional delivery system based on “continuous progress,” and 2) intensive, standards-based and student-centered instruction that supports each student learning at their own pace, in all core content areas.

To redesign the instructional delivery system, the school created a core set of structures combined with the ability to use flexibility in grouping students to accommodate students’ abilities to learn at their own pace, with some spending more time in a particular grade level and others less, depending on their particular learning needs. To do this, the school has relied upon key autonomies and flexibilities from district and other policies and practices in the areas of schedule and calendar, student enrollment/assignment, grading, grade-level matriculation, intensive use of small-group instruction combined with flexible groupings of multi-aged groups aligned to students’ levels of mastery. Supporting the “continuous progress” model also required the implementation of a different staffing model than typically utilized by most traditional elementary schools.

The focus on intensive, standards-based and student-centered instruction leveraged the opportunities inherent in having all students distributed in smaller groups based on their learning needs within a particular content area. This structure provided teachers with key opportunities to deliver more intensive forms of instruction, continuously responding to student needs by conducting ongoing formative assessments, frequently using data to diagnose each students’ individual levels of mastery against each standard. To accomplish this, the school relied on its autonomy to develop and/or select its own curriculum, design and implement its own approach to instruction, develop assessments, and pursue its own professional development for teachers.

The innovation school model became known as the “Continuous Progress” model and over the past five years has not only demonstrated success in raising achievement at the school, but served as a resource for effective standards-based practices within the district. Since becoming a continuous progress school, our teachers have changed the way instruction is provided. As a result, students have shown increased academic progress across all subject areas and the school has moved up in its state ranking -- from the 6th percentile in 2012 to the 34th percentile in 2016, earning Level 1 status as well.

After five years of implementation, we have worked hard to develop and improve our innovative model and are now at the point of full enrollment as a school. Over the next five years, we seek to continue refining our practices, leveraging the opportunities granted through innovation status, and working to sustain the continuous progress model. While the district has generally been very supportive of our innovation plan and overall efforts as a school, securing and sustaining an adequate funding level to fully support the unique staffing model that was originally proposed has at times, been a challenge, especially in the context of declining resources and competing priorities at the district level. Over the coming months and years, we hope to work collaboratively with the district to determine an appropriate, fair, and equitable funding model that provides an adequate level of support for our innovation model without compromising other high-need schools.

1 In 2010, the school was in “corrective action” under No Child Left Behind with the majority of Carlton students testing at the needs improvement or warning level and the school designated a Level 3 school by the MA state accountability system.
We believe that the Carlton Innovation School by incubating and catalyzing innovative practices, serves a key role within the Salem Public Schools. As the district moves forward with its recently adopted strategic plan, it desires to create a “vibrant teaching and learning ecosystem” that prioritizes standards-based, personalized, and student-centered learning across all schools and classrooms. Over the past five years, Carlton has been a leader and pioneer in this regard and know that we can continue to further refine our practice and abilities to deepen our instructional practices to ensure learning and growth for all students. Going forward, we envision our school having even greater opportunities to both personalize student learning and increase student engagement in learning through hands-on, student-centered engagement in activities and rigorous instruction. If supported in our renewal plan, we will serve as both a partner and potential “laboratory” for developing and sharing our innovative practices, district-wide.

We also believe we can play a role in helping the district to reverse the current trend of declining enrollment. Over the past five years, demand from parents who want to enroll their children in our school has increased significantly, with more parents seeking spots in Kindergarten than there are seats available. Increasingly, families have opted to transfer to the Carlton at other grade levels as well. While this has helped the school reach its originally desired “full enrollment” of 260 students (as outlined in the original innovation plan), it has also created new challenges. As the numbers of students have increased, our ability to maintain the level of intensive and individualized instruction originally envisioned and provided when enrollment was smaller, has been strained. Nonetheless, this increased demand to attend our school reflects the fact that our school is providing a type of learning that the families of Salem increasingly desire for their children. In an environment where families increasingly have choice and options for schooling, the ability of the district to offer high quality programming to all families is critical to ensuring that families choose to stay in the district.

We would like the opportunity to continue providing these opportunities for Salem families and, over time, work collaboratively with the district to expand and replicate our model and/or practices so that we can serve more students in the district or support the district with building some of our successful practices and structures into other schools as interest arises. In particular, we look forward to collaborating with the district to determine the best approach for supporting those 5th grade students, who by 2018, may have accelerated their learning in 5th grade to the point where they may be ready for learning at the 6th grade level, early in their traditional 5th-grade year. By 2018, we will have a cohort of 4th graders who have transitioned to the 5th grade in either the spring or fall of their 4th grade year (based on the traditional school schedule). When this happens, they may then complete and master 5th grade requirements much earlier than most traditional 5th grade students. We would like to work with the district to determine a desirable solution and future pathway to support the accelerated learning of these students as they prepare to transition to the 6th grade. Some potential ideas that could be discussed is the option to expand to a K-8 school, to develop a 6th through 8th grade “strand” or “school-within-a-school” model within the district’s middle schools or other potential “innovations.” The role and timing of the MCAS administration for these students is also important to consider.

Although the demographics of the school have changed slightly since the beginning of the Innovation Plan, our school generally serves a high needs student population with nearly half of our students identified as Economically Disadvantaged (47.3%), and almost 22% are students with disabilities. Racially, the school has seen an increase in the number of White students attending (from 53% to 61.9%) with a corresponding decrease in the non-white student population (from 47% to 38.1%). The most notable change over the past five years has been a decline in the percentage of English language learners (ELL) within the school (from

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2 This is especially true in the fall trimester, when the majority of parents with 5-year old children seek a kindergarten assignment. For the 2017-18 Kindergarten enrollment process, there were 20 Kindergarten seats available for the fall trimester and yet 51 families had selected the Carlton as their first choice school. So, the 2017-18 Kindergarten class at the Carlton will consist of 20 students enrolled in the Fall trimester, with an additional 16 seats available in the Winter trimester (10 have been enrolled to date) and 13 seats available in the Spring trimester (8 have been enrolled to date).
over 20% in 2012 to just under 8% in the current year). While there may be many reasons for this shift, one explanation is the district’s 2013 decision to consolidate programming for “newcomer” students who required intensive English language support within the Nathaniel Bowditch School. As a result of this decision, many ELL students moved out of the Carlton school in 2013. The chart below provides an overview of the school’s demographics from 2011 through the current school year.

Looking carefully at our student performance data, we see an overall trajectory of improvement for all students, however some of our high needs subgroups (English Language Learners, Former English Language Learners, Students with Disabilities and Economically Disadvantaged) are currently underperforming. For example, while ELA growth increased by one point in 2015-16, it declined by 2.5% for our high-needs subgroup and over 16% in Math SGP for the same group between 2015 and 2016. The charts below provide a summary of our school’s performance data over the past five years. As we move forward with a new innovation plan, improving results for these students must be our focus and top priority.

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3 The district-wide average for English language learners is 14%
4 Data are based on October 1 state reports.
Our success with these and all students rests on our school’s ability to continue to implement and improve upon the innovations begun in 2012. The proposed innovation renewal plan will allow us to sustain our continuous progress model so that we can continue to improve student learning. It is clear that our population of students is responding to the innovations in our plan and it is critical that we have the autonomy to continue implementation.

D. Primary Proposed Partnership(s)

1. Partnerships with Organizations

The Carlton Innovation School has benefited from a variety of partnerships with the following organizations that support a continuous progress innovation school model:
These partnerships have supported us in a variety of ways such as deepening students understanding of the curriculum by offering or funding resources and hands on experiences.

2. Parents as Partners

More than any formal organization, however, the parent community at Carlton has become our primary partners in the school. Since the implementation of the innovation plan, enrollment and interest in the Carlton Innovation School has grown tremendously. We currently have a waitlist for Kindergarten and during open Kindergarten enrollment, Carlton is visited by many prospective families.

The level of parent engagement, support, and involvement has risen in recent years. There is a dramatic increase in the number of parents that come to parent/teacher conferences. Carlton does not have a librarian. The library is run by a group of parent volunteers. These parent volunteers have adjusted their schedules so the library can be open before and during school. This allows students authentic opportunities to select books based on their personal interest as well as independently decide if books are at an appropriate reading level. Also, these parent volunteers support teachers by selecting and organizing texts based on units being taught in social studies and science as well as mentor texts for Reading and Writing workshop.

Parent volunteers manage the book room. The book room is stocked with texts at all levels which ensures that each student, no matter what reading level, can receive small group instruction to move them along their individual continuum of learning. The time that they spend in the book room is invaluable to teachers’ instruction and every student’s education.

Parent volunteers spend countless hours preparing for the yearly play at Carlton. The play takes several months to prepare and parents are there every step of the way. They conduct auditions, create costumes, design sets, run rehearsals, create and teach the choreography, and work backstage. The backstage volunteers serve as mentors to students teaching them how to work the lights, curtains, and move set equipment ensuring that even more students have a role in this great production each year. There are two sold out performances every year to accommodate all families.

We host events to bring families into our school after hours. For example we have Karaoke night, Math and Literacy night, Earth Fest, Pumpkin Fest, and movie nights. These events are widely attended and give students and their families additional opportunities to meet and socialize. Several performances take place throughout the year. The P1 and P2 students have a winter concert, E1 has a recorder concert, and E2 performs in a Veteran’s Day Show. All students participate in the Celebration of Learning at the end of each school year. All performances have a large audience, but the Celebration of Learning has so many attendees, that it now split into a Primary and Elementary show.

The PTO organizes and funds a variety of events at the Carlton Innovation School. It meets monthly to discuss issues surrounding Carlton and to develop new ways to support students and staff. They ensure that every Carlton student can attend field trips free of charge and are at every after school event. They spearhead fundraisers to ensure that Carlton students have as many opportunities for learning outside of the school building as possible. Attendance has continued to increase each year.
3. Teachers as Partners

Finally, teachers are also key partners in the innovation school. Originally, this plan was created through the incredible collaboration of the teachers and staff at the Carlton School who spent well over 200 hours developing it. As we began the initial work of re-writing the plan, teachers were just as enthusiastic and involved to reflect on what we had learned from our journey and how to improve the innovation plan moving forward.

IV. How Autonomies and Flexibilities will Improve Student Achievement

A. Introduction and Overview

Before summarizing the autonomies and flexibilities requested, it’s important to more deeply understand the ways in which the school structures have been redesigned to support the “continuous progress” model at the Carlton Innovation School. There are two foundational elements of the Carlton Innovation Plan that provide the context for the types of autonomies and flexibilities needed. These elements are described below along with a summary of the types of autonomies and flexibilities needed to support them.

1. A Redesigned Instructional Delivery System based on Continuous Progress.

The school uses a trimester transition system as its key innovation. By accepting kindergarten students at three (3) different points in the year (Fall, Winter, and Spring) based on the timing of a child’s 5th birthday, and then transitioning all students to the next grade when ready, the school seeks to tailor instruction to each student (see Appendix B for an overview of the Carlton Kindergarten Registration Process). In this model, some students spend more than one year in a particular “grade level” while other students spend less, depending on their specific learning needs relative to the standards. The goal for all students is mastery of all K-5 standards by the end of their time in their school. This single innovation leads to a slew of additional innovations such as: use of data to guide daily instruction, the technology to track student data, small group instruction, flexible groupings of multi-age students, creative staffing schedules, increased common planning time to support flexible groupings, multi-age classrooms, transition meetings with students to set goals for the next grade level, use of before school starts for assessment camp and intensive professional development on diagnostic instruction, among others.

Key autonomies and flexibilities are required to support this delivery system, including:

- The autonomy to enroll Kindergarten students in three trimester “waves” based on the timing of their 5th birthday (before September 1, December 1, and March 1) -- as opposed to one enrollment period for the full kindergarten class in the fall
- The autonomy to transition and/or matriculate students from one grade-level to the next when they are ready, based on each student’s demonstrated mastery of learning the standards for that grade level – as opposed to the traditional matriculation schedule where students transition to the next grade in the fall each year
- The autonomy for teachers to have increased daily common planning time in order to determine flexible groupings of students based on data and work collaboratively to assess each students’ mastery of the standards and determine their readiness to transition from one grade level to the next at three different points in the year – as opposed to traditional grading practices and timelines
- The autonomy to hire and deploy an additional set of academic content teachers (we call “Academic Specialist Teachers”) in special roles to implement simultaneous strands of small-group instruction throughout the day, for all students in each subject – as opposed to a traditional elementary school with self-contained and/or departmentalized classrooms using whole group instruction

See also http://salemk12.org/Pages/SPS_DistParentRes/Carolton%20Trimester%20Reg%20info.pdf
• The autonomy to establish the school’s schedule and calendar independent of the school district in order to accelerate learning for students and support teacher professional development – as opposed to the traditional district calendar.

2. Intensive, Standards-based and Student-centered Instruction

With the structure of continuous progress described above as the foundation, teachers are able to deliver more intensive instruction and support learning across all subjects. Working within the small-group framework, teachers are able to conduct frequent formative assessments, increased daily common planning time, use data to continuously diagnose each student’s individual levels of mastery against each standard, and personalize learning in various ways. Teachers at the Carlton benefit from more common planning time than most other elementary schools in the district and are more actively involved in curriculum development, assessment design, and in developing inquiry- and project-based approaches to science and other subjects. As a result, students are more engaged in their learning and enjoy their time at school.

Key autonomies and flexibilities are required to support the intensive, standards-based and student-centered instruction at the Carlton, include:

• The autonomy to develop and/or select our own curriculum
• The autonomy to develop and implement student assessments that are aligned to the standards, curriculum, and support teachers’ ability to determine the extent to which each student has mastered the standards
• The autonomy to add common planning time to teacher’s schedules
• The autonomy to continuously use data to monitor student progress and use flexibility to place students in multi-aged, small groups across subjects based on their specific learning needs – as opposed to occasional groupings and differentiated instruction with one teacher
• The autonomy to personalize learning by engaging students as individual learners
• The autonomy to create our own standards-based report card
• The autonomy to identify, select, and utilize technology and other tools to support the continuous progress model.
• The autonomy to establish our own schedule and opportunities for teacher professional development

B. The Successes of the Carlton Innovation School

Since the approval of Carlton’s first innovation plan in 2011, the continuous progress model has played a major role in the turn-around of the school both culturally and academically. The innovations in both the structure and curriculum have supported the teaching and learning of individual students as their continuous academic progress is prioritized. This tailored instruction has significantly improved student achievement.

Successes include:

Academic Improvement
• Moving from a Level Three designation in 2012 to a Level One designation in 2015.
• From 2012-2016 Carlton Innovation School’s state ranking on PARCC and MCAS has increased from the 6th percentile to the 34th percentile.

Increased Demand
• Historically, Carlton has been an under enrolled school within the district with little interest among families. Currently, interest in our school has increased and we now have a waitlist for students entering Kindergarten.
Awards and Recognition

● Received the 2016 Massachusetts Reading Association Exemplary Reading Program Award and the 2016 International Literacy Association Exemplary Reading Program Award.
● Spotlighted by the Rennie Center for Massachusetts Exemplar Schools.
● One of five schools invited to apply for the prestigious Pozen Prize.

Best Practices Dissemination

● Carlton educators have conducted professional development for district staff in Reading and Writing Workshop, Academic Productive Talk in Math, and standards-based grading and instruction.
● Carlton educators have assisted the district with writing curriculum.
● Schools from across New England have come to observe our innovative style of teaching, assessing, and community building.

Most importantly the difference our staff and families have noticed in students’ learning, attitude, motivation, confidence, and joy is overwhelming. Students take ownership over their learning and have a growth mindset. They self-assess, set goals, and work towards achieving those goals because they know their education is in their control. You can feel the difference in the energy of our community when you enter the doors of our school.

C. Defining the Continuous Progress Model at the Carlton Innovation School

It is important to define our interpretations of “Continuous Progress” as a model concept for our Innovation School because there is no accepted definition within the educational field. To the Carlton community, “Continuous Progress” means:

The Instructional Delivery System:

- Kindergarten students begin one or two trimesters earlier, allowing more time for their growth and development.
- Each student progresses through cohorts at his/her own pace, allowing for extra time to complete standards as necessary or to move ahead in the curriculum.
- We support multi-age classrooms that allow teachers to develop strong relationships with students and families.
- Trimester transitions within multi-year classrooms allow students to move from the newest members of the community to the expert focusing on the growth mindset.
- Students work at different levels within different content areas depending on their progress with the standards, allowing students to move through the curriculum at a faster or slower pace as needed.
- Teams of two teachers share two classes of children for small group instruction, which creates an environment where flexible small groups can be formed and changed efficiently based on student need. Groups of students change as necessary (sometimes even weekly).
- Teachers work in teams and are deployed in flexible ways to “flood classrooms” with academic specialists to provide small group instruction to specific groups of students working at different levels.
- School structures such as schedule and calendar support intensive collaboration and common planning time in order to support teachers to communicate students’ daily progress and needs.

The Instructional Practices:

- Teachers engage students as individual learners. Our goal has been to switch the teacher’s focus from the class to each individual student, which will result in individualized instruction instead of whole-class instruction.
• Teachers and staff value the whole student and student learning is matched to the social
development of the child
• We use small group instruction in all content areas
• We continuously assess students to determine needs and assign students, flexibly, to small groups
• We transition three times per year so students can accelerate to the next grade based on academic
abilities, social emotional benchmarks, and/or age.
• Flexible groupings of students within classrooms and across trimesters allows students to develop
deep relationships with their peers and with their teachers
• Each student receives instruction matched to his/her achievement level everyday. This is achieved
through flexible grouping. Teams of two teachers share two classes of children for small group
instruction, which creates an environment
• Each student develops an awareness of his/her strengths and weaknesses and takes ownership of
his/her learning and achievement
• The core subjects of reading, writing, and math are taught using a workshop model with intensive
and targeted small group instruction.
• Intensive assessment strategies are used daily to make instructional decisions. Most prominent is
teacher observation and student work. Common assessments on standards also occur regularly.
Progress and independence are monitored with longer district assessments 6-8 times per year.
• Standards-based continuums are used for each team level in each core subject, based on the new
MA Frameworks and Common Core State Standards.
• The content areas of science and social studies are taught using inquiry-and project-based methods
in heterogeneous groups.
• The curriculum emphasizes student ownership of learning and progress across the standards by
involving students with formative assessment and goal setting for mastery.
• Instructional approaches emphasize active and authentic student learning, student discourse,
writing, and thinking.
• Identified students will have the opportunity to participate in Success Block to receive a double
dose of instruction in that student’s area of greatest need or to extend his/her progress.

The fluid movement of students at the Carlton Innovation School’s continuous progress model adds a layer
of complexity to the daily logistics of school administration. Normal procedures that take place once a year
at traditional schools, such as class assignment, orientation, bus enrollment and demographic data
accounting, actually happen three times a year at Carlton. It requires continuous effort and flexibility on the
part of the school and district personnel to make these processes possible.

The effort to sustain a non-traditional school structure has resulted in significant student ownership, growth
mindset, collaborative school culture, and strong consistent student achievement. The personalization of
instruction helps students play an active role in their education. Their education is not something that
happens “to them” as a passive recipient. The transparent assessment and instruction cycle help students
understand their learning process as well as the learning outcomes. Because students do not move in
cohorts from grade to grade the comparison and competition in learning is all but eliminated, resulting in a
culture of strong growth mindset. The flexible structure allows students to fully master standards before
moving to the next curriculum and instructional level and results in stronger student achievement. It is clear
that the extra efforts needed to ensure the continuous progress model results in a strong educational
experience for all students.

We believe the Continuous Progress model has significantly raised student achievement on multiple
measures and will prepare each student for the rigorous academic life of middle school, high school, and
college. Three other aspects of our model are important to understand, including:
1. School Structure

In order to support the individualized teaching of each student, the school abandoned the traditional grade level “one size fits all” model, instead placing students in multi-age classrooms that combine traditional grade levels within a larger team distinction. Students are assigned to “homerooms” with core elementary teachers and which generally have a larger student-teacher ratio, for the duration of their time in a particular grade level. As they move through learning and mastery of standards within specific content areas, the students are broken up into smaller instructional groups of 1:12 (or less) that are facilitated and supported by both core elementary teachers along with the reading, math, and science specialists employed at the school. Instead of traditional grade levels, the Carlton teaching teams are organized according to the following framework.

Table III below provides a visual representation of the school’s structure. The final column of the framework depicts the possible number of trimesters students may spend within each student cohort. In addition, two sub-separate, “Learning Skills” classrooms are housed at the school for students whose IEPs require this intensive support and services.

<table>
<thead>
<tr>
<th>Teaching Team and Student Cohorts</th>
<th>Age-Range</th>
<th>Traditional grade range</th>
<th>Number of classrooms in the school</th>
<th>Possible number of trimesters</th>
</tr>
</thead>
<tbody>
<tr>
<td>Primary 1 P1</td>
<td>5.0-6.0</td>
<td>Kindergarten</td>
<td>3 (1 Integrated K included)</td>
<td>2-5</td>
</tr>
<tr>
<td></td>
<td>with the option of remaining until 6.5</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Primary 2 P2</td>
<td>6.0-8.0</td>
<td>1-2</td>
<td>4</td>
<td>5-8</td>
</tr>
<tr>
<td></td>
<td>with the option of remaining until 8.5 or 9.0</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Elementary 1 E1</td>
<td>7.5-9.5</td>
<td>3</td>
<td>2</td>
<td>2-5</td>
</tr>
<tr>
<td></td>
<td>with the option of remaining until 10.0</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Elementary 2 E2</td>
<td>8.5-11.5</td>
<td>4-5</td>
<td>4</td>
<td>5-8</td>
</tr>
<tr>
<td></td>
<td>with the option of remaining until 12.0</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Learning Skills (Sub Separate Program)</td>
<td>6.0 – 8.0</td>
<td>1-3</td>
<td>1</td>
<td>9</td>
</tr>
<tr>
<td>Learning Skills (Sub Separate Program)</td>
<td>8.0– 12.0</td>
<td>4-5</td>
<td>1</td>
<td>6</td>
</tr>
</tbody>
</table>

As described in the above table, students remain in the same classroom with the same teacher for up to two and one-half years, depending on the student’s progress. Students transition to the next team (grade) level when academically, socially, and emotionally ready. These transitions happen in August, December, and
March, each year. This means that some students move mid-year while others remain in the same class for additional trimesters. This also allows a student to increase the amount of time within a grade level without repeating an entire year in that grade. Because students leave and enter classrooms at various times, the social stigma of grade promotion and retention is non-existent.

Currently, Carlton houses the district-wide Learning Skills substantially separate program for grades 1-5. The Learning Skills Program serves students with moderate disabilities that impact their ability to access the general education curriculum without significant modifications, accommodations and specialized instructional support. The program provides academic, language, fine and gross motor and social skill development within a small, highly structured, safe and nurturing learning environment. The use of positive reinforcement and success-oriented experiences supports student growth towards personal independence, specific IEP goals and overall academic achievement.

Students in the Learning Skills Program access core content in small group settings with content based on the Common Core Curriculum and Salem Public Schools Curriculum Maps, adapted as needed, to meet the unique learning needs of the students. Students in the Learning Skills Program are included with peers in homeroom activities and all aspects of the school community. Individual students may also mainstream for selected academic subjects, including Guided Reading, Math and English Language Arts, according to their IEP.

The integrated kindergarten program also runs on an August to June model. This classroom has a cap of 14 students and cannot exceed more than 50% of students with IEPs. In both programs the amount of inclusion in core curricular blocks are based on each individual student’s needs.

2. Trimester Enrollment Patterns and Procedures

Our model results in a non-traditional enrollment pattern as well as a non-traditional staffing structure. Students’ transition to the next team (grade) level when academically, socially, and emotionally ready. These transitions happen in August, November, and March. This allows teachers to move students to the next cohort (or “grade level”) when the individual student is ready, rather than at the end of the traditional school year. This means that some students move mid-year, while others remain in the same class for additional trimesters. This also allows a student to increase the amount of time within a grade level without repeating an entire year in that grade. Because students leave and enter classrooms at various times, the social stigma of grade promotion and retention is non-existent.

Kindergarten enrollment patterns are also non-traditional at our school. Students enter kindergarten in August, November, and March based on their 5th birthday. This gives students the opportunity to start kindergarten early and the flexibility to spend additional time in areas of the curriculum until they have reached mastery of all standards. Our unique enrollment pattern requires Carlton to enroll fewer students in kindergarten in August compared to the rest of the district, however, our actual Kindergarten classes are full because the students who enrolled in the previous (Winter or Spring) trimester are still there. Each trimester we can only accept the same number of students in kindergarten who are moving on to the next grade level (which at Carlton is a combined grade 1/2 classroom that we call “P2”). So, for example, in the Fall Trimester (September) the number of Kindergarten spots available corresponds to the number of Kindergarten seats that are open based on those who had enrolled in the previous year’s Fall or Winter Trimesters and are ready to transition to P2. If a student requires an additional trimester in P1, then that seat would not be available to a new Kindergarten student until the following Trimester, or until the P1 student was ready to transition to P2.

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6 While most of the district’s Integrated Kindergarten classrooms have a capacity of 15 students, the district and the school agreed to a maximum of 14 students for this classroom in order to ensure that all of the students can participate in specials classes without going over class size maxima.
Table IV below attempts to depict the trimester transitions of Kindergarten (P1) students as they begin enrollment, thus experiencing their first trimester (P1-T1) in the Fall, Winter, or Spring Trimester and transition through each subsequent trimester. For example, the cohort of 20 incoming Kindergarten students entering in the Fall of 2017 for their first trimester would join the 34 Kindergarten students who had begun during the Winter and Spring Trimesters of the previous year (19 who had their T1 entry in the Winter of the previous year, and 15 who had their T1 entry in the Spring of the previous year). Both of these cohorts have transitioned to their next trimesters, respectively (P1-T3 and P1-T2). As the cohort of 20 who had entered in the Fall transition to their T2 trimester, new spaces open up for new Kindergarten students to enroll in the Winter Trimester as the T3 cohort of 19 move on to their first trimester in P2 (the equivalent of 1st Grade). For Winter 2017, we expect to enroll up to 16 new Kindergarten students.

**Table IV: Trimester Transitions of Kindergarten (P1) Students**

<table>
<thead>
<tr>
<th>Trimester Cohort</th>
<th>KF enrollment in Fall Trimester Sept 2017</th>
<th>KF enrollment in Winter Trimester Dec 2017</th>
<th>KF enrollment in Spring Trimester March 2018</th>
<th>KF Enrollment in Fall Trimester Sept 2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>KF (P1-T1)</td>
<td>22</td>
<td>16</td>
<td>13</td>
<td>TBD (up to 25)</td>
</tr>
<tr>
<td>KF (P1-T2)</td>
<td>15</td>
<td>22</td>
<td>16</td>
<td>13</td>
</tr>
<tr>
<td>KF (P1-T3)</td>
<td>19</td>
<td>15</td>
<td>22</td>
<td>16</td>
</tr>
<tr>
<td>Gr 1 (P2-T1)</td>
<td>n/a</td>
<td>19</td>
<td>15</td>
<td>22</td>
</tr>
<tr>
<td>Gr 1 (P2-T2)</td>
<td>n/a</td>
<td>n/a</td>
<td>19</td>
<td>15</td>
</tr>
<tr>
<td>Gr 1 (P2-T3)</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
<td>19</td>
</tr>
<tr>
<td>Total KF Enrollment</td>
<td>56</td>
<td>53</td>
<td>51</td>
<td>TBD (avg of 56)</td>
</tr>
</tbody>
</table>

The above example is meant to illustrate how the transitions occur creating open spots for new Kindergarten students. In reality, however, the number of students who transition to the next grade level between trimesters depends on the specific levels of mastery for each individual child. While many students spend three trimesters at each “grade level” some spend more and some less. The decision of whether or not a student is ready to transition is made by the teacher teams for each cohort. The team of teachers who work with each individual student reviews the student’s progress to determine if they are ready to move to the next grade level in November, March, and June.

At all times our classrooms range from 18-22 students in each homeroom. Table V below provides a summary of the distribution of Carlton’s students by grade level (as of June 2017) and Carlton Team Cohort and describes the approximate size for each homeroom.

**Table V: Distribution of Carlton Students by Cohort and Grade Level with Homeroom Size**

<table>
<thead>
<tr>
<th>Grade Level/Cohort</th>
<th>Carlton Team Cohort</th>
<th>Total # of Students in June 2017</th>
<th>Total # of Homerooms (Core Elementary Teachers)</th>
<th>Approximate Homeroom Class Size</th>
</tr>
</thead>
<tbody>
<tr>
<td>KF</td>
<td>P1</td>
<td>54</td>
<td>3</td>
<td>18</td>
</tr>
<tr>
<td>01</td>
<td>P2</td>
<td>55</td>
<td>4</td>
<td>22</td>
</tr>
<tr>
<td>02</td>
<td></td>
<td>34</td>
<td></td>
<td></td>
</tr>
<tr>
<td>03</td>
<td>E1</td>
<td>37</td>
<td>3*</td>
<td>12.3</td>
</tr>
<tr>
<td>04</td>
<td>E2</td>
<td>41</td>
<td>5*</td>
<td>15.8</td>
</tr>
<tr>
<td>05</td>
<td></td>
<td>38</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total of 259 Students</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
There are two (2) sub-separate classrooms and homerooms (one is for grades 1-3 but reflected in E1 above and the other is for E2). The total number of students and total number of homeroom teachers in this table includes the both the sub-separate students and teachers.

The student transitions will also soon affect next year’s cohort of 4th and 5th graders, what we call E2 at the Carlton. Table VI below table attempts to depict the trimester transitions for the E1 and E2 cohorts as they transition each trimester either within their current “grade level” or matriculating to the next grade level.

**Table VI: Trimester Transition for E1 and E2 Cohorts**

<table>
<thead>
<tr>
<th>Trimester Cohort</th>
<th>Gr 5 enrollment in Fall Trimester Sept 2017</th>
<th>Gr 5 enrollment in Winter Trimester Dec 2017</th>
<th>Gr 5 enrollment in Spring Trimester Mar 2018</th>
<th>Gr 5 enrollment in Fall Trimester Sept 2018</th>
<th>Gr 5 Enrollment Winter 2018</th>
<th>Gr 5 Enrollment Spring 2019</th>
<th>Gr 5 Enrollment Fall 2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gr 3 (E1-T1)</td>
<td>28</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Gr 3 (E1-T2)</td>
<td>6</td>
<td>28</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Gr 3 (E1-T3)</td>
<td>6</td>
<td>6</td>
<td>28</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Gr 4 (E2-T1)</td>
<td>30</td>
<td>6</td>
<td>6</td>
<td>28</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Gr 4 (E2-T2)</td>
<td>6</td>
<td>30</td>
<td>6</td>
<td>6</td>
<td></td>
<td></td>
<td>28</td>
</tr>
<tr>
<td>Gr 4 (E2-T3)</td>
<td>2</td>
<td>6</td>
<td>30</td>
<td>6</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Gr 5 (E2-T4)</td>
<td>2**</td>
<td>6**</td>
<td>30</td>
<td>6**</td>
<td></td>
<td></td>
<td>6</td>
</tr>
<tr>
<td>Gr 5 (E2-T5)</td>
<td>2**</td>
<td>6**</td>
<td>30</td>
<td>6**</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Gr 5 (E2-T6)</td>
<td>2**</td>
<td>6**</td>
<td>30</td>
<td>6**</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Grade 5 (traditional model)*</td>
<td>31</td>
<td>31</td>
<td>31</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
</tr>
<tr>
<td><strong>Total Gr 5 Enrollment</strong></td>
<td><strong>31</strong></td>
<td><strong>33</strong></td>
<td><strong>39</strong></td>
<td><strong>38</strong></td>
<td><strong>44</strong></td>
<td><strong>50</strong></td>
<td><strong>40 + TBD</strong></td>
</tr>
</tbody>
</table>

*The 5th grade cohort for the 2017-18 school year is operated on a traditional basis. The “continuous progress model” began in 2012, and this year’s 5th graders were in the school when it began, but they did not fully experience the model. Next year’s 5th grade cohort, however, will be the first cohort to have experienced the continuous progress model throughout their entire elementary school experience.

**Indicates students who are accelerated in their learning and who may master the standards for 5th grade prior to completing elementary school. These students will benefit from the support of a Flex Teacher in 2018-19 who will continue their accelerated learning to prepare for 6th grade.

***While most of these students will transition out of elementary school, some may require additional time in E2 before exiting.

Students’ placement into each trimester (T1, T2, or T3) for each grade level depends on their level of mastery of the standards aligned to that grade level and trimester. As described above, some students are accelerated in their learning and may complete the 5th grade standards ahead of the traditional schedule. These students will benefit from a Flex Teacher who will continue to support their accelerated learning. Other students may transition to the equivalent of 5th grade a trimester or two prior to their final year at the school, thus spending four or more trimesters learning at the 5th grade level. The total number of 5th graders projected to be enrolled in the Fall of 2019 will depend on the number of E2 students who are fully ready to exit the school in the Spring of 2019 as compared with those who need additional time in the 5th grade.
3. Transitioning Students

The continuous progress model at the Carlton Innovation School emphasizes an individualized approach to teaching and learning designed specifically to better serve our population and demographics. The structure of the school, the staffing patterns, and the curriculum are key supports to the continuous progress of each student and the overall improvement of our school’s performance.

A student entering Kindergarten may begin school the trimester after his/her fifth birthday. Prior to arriving at school, students are assessed with an enhanced screening containing additional assessments that allows the teacher to place the student along the standards continuum.

The student remains in his/her classroom until he/she has reached the minimum transition age and the required standards for that cohort - roughly two full calendar years or six trimesters for grades 1/2 and grades 4/5 and one calendar year for Kindergarten and grade 3. On average, most students spend the equivalent of one school year in each grade, but many move ahead or remain in a cohort for longer or shorter based on need. This means that a student moves to the next cohort at the conclusion of the trimester, based on his/her individual progress instead of at the conclusion of the school year. Just before the end of the trimester the classroom teacher reflects on the student’s progress across all curriculum area continuums and the student’s social and emotional growth. The structure of these teams and the use of a standards-based continuum for each team ensures developmental flexibility within an appropriate socio-emotional peer group. If the teacher determines the student is ready to transition to the next cohort, a team meeting will be called that includes the student, the current teacher, the receiving teacher, the parents, and any additional staff in the building that works with the child. At this team meeting the student presents what he/she has learned, his/her goals for the next cohort, and why he/she should move to the next cohort. The purpose of this meeting is to help students take ownership of their learning and progress. The current teacher spends time discussing the student’s strengths and needs and a transition plan is made and celebrated. To support the instruction in the classroom, every attempt is made to keep homeroom class sizes below 24.

### CONTINUOUS PROGRESS TRIMESTER MAP

<table>
<thead>
<tr>
<th>August - November</th>
<th>November - March</th>
<th>March - June</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>August</strong></td>
<td><strong>November</strong></td>
<td><strong>March</strong></td>
</tr>
<tr>
<td>• First day of school</td>
<td>• Students who turned 5 after September enter Kindergarten.</td>
<td>• Students who turned 5 after November enter Kindergarten.</td>
</tr>
<tr>
<td>• Students deemed ready transition into next homeroom; those not ready re-enter same class.</td>
<td>• Review of all students progress.</td>
<td>• Review of all student progress.</td>
</tr>
<tr>
<td>• New crop of recent 5-year-olds enter Kindergarten</td>
<td>• Those deemed ready move up a level.</td>
<td>• Those deemed ready transition into the next level.</td>
</tr>
</tbody>
</table>
4. Student Case Studies: Individualized Education Pathways of the Continuous Progress Model

Case Study 1

The above case study represents the path that a current grade 4/5 student’s education was able to take because of our continuous progress model. This student has been at Carlton since she was in Kindergarten. She did a typical number of trimesters in Kindergarten and grade 3. In grades 1/2 and 4/5 this student did additional trimesters. The decision to have this student complete additional trimesters was made by the student, the child’s mother, and her teachers. In grade 1/2 she was struggling immensely both academically and emotionally. She was significantly behind in math and had difficulties with peer and adult relationships. During her extra trimester in grade 1/2, she was able to gain self-confidence, continue to grow her reading level, and begin to close the gap between her performance and common core expectations in math. Not only was she able to continue to work on areas that she was struggling in, she was able to continue to grow her reading level because of the small group diagnostic instruction that is a major component of this innovation model. During her additional trimesters she was not retaught the same concepts in the same way, but her teachers had the resources, tools and autonomy to meet her individual academic and emotional needs. Currently in grade 4/5, she continues to grow as a reader and is now known as “the division queen” by her peers in math. She has become a role model that looks forward to helping her peers better understand concepts in all subject areas. She is graduating in June 2017.
Case Study 2

The above case study represents another student’s educational path that she was able to take because of Carlton’s continuous progress model. This student is currently in grade 3 and started at Carlton as a grade 1/2 student. In all subject areas, she quickly began to demonstrate mastery of the common core standards. For example, she entered grade 1/2 reading at a mid second grade reading level and had a strong conceptual knowledge of math concepts. Carlton teachers were able meet her individual needs because of the small group instruction. Because she was able to quickly progress through the 1st and 2nd grade common core standards, the student, her teachers, and her family decided she was ready to move to grade 3 a trimester earlier than her typical peers. Instead of staying in her current class until June like in a typical school, she was able to move to the next level and be surrounded by peers and teachers who could further push her to achieve her academic potential.

5. Accelerating Student Achievement

The structure of the Carlton School supports the individualized teaching of each student ensuring his or her continuous academic progress. Each student is looked at as an individual, taking into account the whole child when planning instruction. Students receive diagnostic instruction based upon ongoing formal and informal assessments, resulting in greater academic achievement. By using a multi-age approach, students are able to progress at an individualized, developmentally appropriate rate. Student growth is evident because their individual academic needs are met.
E. Summary of Six Autonomies and Flexibilities

1. Curriculum, Instruction, and Assessment

We seek to continue with the autonomies and flexibilities granted in the original innovation plan in the areas of curriculum, instruction, and assessment. Specifically, we seek the following autonomies in these areas:

<table>
<thead>
<tr>
<th>Autonomy Area</th>
<th>Autonomies Requested</th>
</tr>
</thead>
</table>
| Curriculum and Instruction | • The autonomy to develop and/or select our own curriculum  
• The autonomy to continuously use data to monitor student progress and use flexibility to place students in multi-aged, small groups across subjects based on their specific learning needs – as opposed to occasional groupings and differentiated instruction with one teacher  
• The autonomy to create our own standards-based report card  
• The autonomy to personalize learning by engaging students as individual learners  
• The autonomy to create school-wide enrichment opportunities through thematic units of study and student-centered activities |
| Assessment                 | • The autonomy to develop and implement student assessments that are aligned to the standards, curriculum, and support teachers’ ability to determine the extent to which each student has mastered the standards  
• The autonomy for teachers to work collaboratively to assess each students’ mastery of the standards and determine their readiness to transition from one grade level to the next at three different points in the year – as opposed to traditional grading practices and timelines  
• The autonomy to transition and/or matriculate students from one grade-level to the next when they are ready, based on each student’s demonstrated mastery of learning the standards for that grade level – as opposed to the traditional matriculation schedule where students transition to the next grade in the fall each year  
• The autonomy to identify, select, and utilize technology and other tools to support the continuous progress model  
• The autonomy to, if approved by the Commissioner, administer MCAS to students within a timeframe that aligns to their mastery of grade-level expectations |

Curriculum and Instruction

The curriculum for our continuous progress innovation school is derived from the Massachusetts Frameworks that are based on the Common Core Standards. Using these documents, we developed a continuum of standards for each classroom level in reading, writing, math, and science. These standards continuums reflect developmentally appropriate standards of achievement within each strand. These continuums contain all the literacy, math, and science standards that the student is expected to reach during his/her time within that classroom. To support instruction in these standards, we continuously seek, select, and utilize a variety of curricula and instructional materials that align to our learning standards.

Students engage in three rigorous workshops for each core subject of reading, writing and math. The reading and writing workshop lasts for 120 minutes and the math workshop lasts 80 minutes. This model
consists of a 10-minute multilevel mini-lesson that challenges students to think about the concept in a sophisticated way. Then students break into small groups and individual workstations within the classroom. During this time, the team of 2-4 classrooms at the same age range, are flooded with specialist teachers for small group instruction and individual conferences. (Please see staffing diagram on page for more detail.) This flooding ensures that each student is instructed at their zone of proximal development, making student progress and growth the priority of teachers, students and parents. Small group instruction consists of guided reading, phonics lessons, guided writing and math target lessons. Students are grouped based on their progress across the standards continuum and performance on common assessments. Placement in groups are fluid and reflect the student’s progress in that core subject at any given time. In this way students have a team of teachers responsible for their continuous progress. At the conclusion of this time a short share period allows students to reflect on how the mini-lesson applied to their small group and individualized work, and goals for the next day are set.

Student discourse within all content areas has been a major focus of our work. We discovered several years ago through guided observations that the ratio of teacher to student talk dramatically favored teacher talk across the school. To address this concern, we worked solely on increasing student talk and decreasing teacher talk. Once we made some progress in the quantity of student discourse, we partnered with consultants to improve the quality of student discourse. Teachers developed rubrics to reflect on current practices and track growth in our students. In addition, teachers observed each other to provide feedback to support this goal.

In order to increase the quality of student discourse in language arts and math we provided multiple opportunities daily for students to engage in conversation through interactive read-alouds, turn and talks, big paper problems, and debrief/shares at the end of lessons. The staff used the model of academically productive talk to introduce talk moves which include revoicing, repeating, reasoning, adding on, and waiting in order to facilitate class and small group conversations. The goal was for students to use these talk moves independently in order to develop understanding and concept knowledge. In science, we posed real world problems and students worked collaboratively to solve them through discussion and inquiry. They learned to not only share things that push other people’s thinking through the use of sentence stems and teacher support, but to hold themselves and others to a high level of conversation. Over time students were able to do this without teacher support or input. Our ongoing data shows that at Carlton, students now do most of the discussion and can engage in discourse with peers in order to develop their thinking and to support and push the thinking of their peers.

Approach to Literacy

The goal of the literacy program at Carlton is for our students to read and write complex texts in sophisticated ways. Teachers use a balanced literacy approach to instruction focusing on phonemic awareness, phonics, vocabulary, comprehension, and fluency through an explicit focus lesson followed by small groups for guided reading and conferences. We teach the Common Core State Standards using Lucy Calkins Readers and Writers Workshop and the Continuum of Literacy Learning by Irene Fountas and Gay Su Pinnell as resources.

Basic Structure of Literacy Instruction and Methods

Our workshop model begins with a short, explicit focus lessons. While students are independently applying the strategy learned in the focus lesson, a rotation of small groups are instructed based on where they are as readers and writers. Teachers use flexible grouping across teams to group students based on individual progress and need. In order to do this effectively we utilize additional content “Academic Specialist” teachers (math specialist, literacy specialist, literacy coach, specialist teachers, and flex teacher) to ensure small group instruction occurs and each child is instructed at their level. This requires that teachers are provided with common planning time in order to collaborate about students learning daily. The amount of
common planning time slightly fluctuates from year to year but typically is a minimum of 150 minutes a week. This is significantly more planning time than most Salem schools and teachers receive (currently, Salem teachers have an average of 45 minutes of common planning time per week).

We focus on assessing students for the purpose of planning their instruction. Every summer we hold an assessment camp where all students are encouraged to come in prior to the school year, for a sixty-minute literacy assessment. We use the Fountas and Pinnell Benchmark Assessment System to identify student reading levels and determine instructional strengths and weaknesses. By doing this, we know our students as readers before they even arrive and we gain six weeks of instructional time. We have developed common assessments related to Common Core Standards (independence checks) and use ongoing running records, writing pre and post assessments, and state standardized assessments to drive instruction and decision making at all grade levels.

In addition to more formal assessments, we use informal observation daily. Those observations and anecdotal notes, along with daily check-ins, drives what is taught the following day based on what students show us they have or have not learned. This is a fundamental part of our mission; to focus on what students have learned not simply what teachers have taught.

Our students play an active role in assessing themselves, reflecting on what they have learned and what their next steps are. Teachers work with students to develop a self-awareness around the expectation and interpretation of the rubric so they can accurately evaluate their work. Students are then able to use self-assessments and rubrics to look at their work and set their own goals. This promotes students being an active part of their learning, which gives them ownership of their progress.

Summary of Autonomy in Literacy

Since Carlton implemented the workshop model and small group instruction, the district has moved in the same direction. However, we use our autonomy to teach units and standards in ways that make sense for our current population of students. Our year-long progression of units does not match the district’s and may change from year to year depending on the needs of the students. Our trajectories for our workshop model are continuously changing due to our student-driven data. The district continues to have single graded classrooms with annual transitions. At Carlton we have multi-age classrooms with three transitions a year. The multi age classrooms and trimester transitions allow students to achieve state standards at a pace that is appropriate to their individual learning. Therefore, we seek continued autonomy over the next five years to be able to have the continued adaptability for our units and application of the workshop model.

Approach to Numeracy

The goal of mathematical instruction is for students to gain mastery of grade level common core standards and be able to apply their understanding of these standards through the eight Common Core identified mathematical practices. We believe this will prepare students to be real world problem solvers. Students develop conceptual understanding in math through exploration, mathematical discourse, and direct instruction. Using the Common Core State Standards, teachers organize lessons to focus on mastery of concepts with structured review opportunities. This balances mathematical thinking with fluency and mathematical operations.

Basic Structure of Instruction and Methods of Numeracy

Using a workshop model similar to the reading and writing workshops described above, teachers provide a connection for student exploration followed by small group lessons and guided/independent practice. Following this work, students are responsible for participating in a debrief that highlights their learning.
Teachers have developed standards based common assessments in order to assess student knowledge related to mathematical standards and practice. We also use informal assessments such as teacher observations, anecdotal notes, and daily exit tickets. Teachers use information gained from assessments to create flexible grouping across classrooms within a team. Students are grouped by standards based needs.

Teachers utilize pieces of several mathematical programs and resources including Illustrative Math, Engage New York, enVision, and Investigations, in order to teach the standards. We have also introduced Dreambox so that students can follow an individualized trajectory of learning independently.

The use of various resources will replace prescribed programs and create a more balanced approach to math instruction. Students receive diagnostic instruction based upon ongoing formal and informal assessments, resulting in greater academic achievement.

**Summary of Autonomy in Numeracy**

Prior to the innovation plan, we used Everyday Math, which matched what the district used. Now we pull from several programs to pull out the most important aspects that we can use for what we want to teach. Because of this we have a wide range of resources at our fingertips to pull in order to meet the needs of our mathematical learners. We use our autonomy to teach standards in ways that make sense for our current population of students. Our year-long progression of standards does not match the districts and may change from year to year depending on the needs of the students.

**Approach to Content in Science & Social Studies**

P1, P2, and E1 students will engage in multi-age heterogeneous groups focusing on alternating science units based on the Next Generation Science Standards and Social Studies units based on C3 Framework for Social Studies State Standards. Each unit will be approximately 4-7 weeks long and will be co-planned and co-taught among team members. Because the schedule will allow for block scheduling, the science specialist will be included in planning and adapting lessons to specific content. Units will include inquiry-based projects or activities. In E2, Next Generation Science Standards and C3 Framework for Social Studies State Standards will be taught continuously throughout the academic year.

Science and social studies topics are explored through inquiry and project-based methods. Instruction in science and social studies will take place in a separate block of time and within heterogeneous whole class groups where students are able to apply their reading, writing and mathematical achievements. Instruction will be multi-disciplinary with the expertise of specialist teachers in art, music, physical education, and technology. This is an opportunity to further extend our green curriculum and science block as incorporated within our green building and organic garden. This infrastructure will further the hands-on nature of our science and social studies curriculum.

**Basic structure of Instruction Methods in Content**

During the units, instruction and student learning will be dedicated to direct instruction and hands-on engagement with the content, including inquiry and project-based exploration. Yearly, a theme will be selected for students to study and explore as a community based in science or social studies. These projects will be displayed and celebrated as a Carlton community in the Celebration of Learning held annually in June. Grades 1/2 and 4/5 will rotate through the science and social studies standards that are dedicated to the two grades assigned to each cohort of students. This allows students to receive both sets of standards in a multi-grade classroom (2 year cycle). Kindergarten and grade 3 will teach the social studies and science standards within their grade to their cohorts of students (1 year cycle). The order of units taught to students will remain consistent from year to year to ensure that students throughout all trimester transitions receive instruction in all standards.
Through inquiry and project-based learning, students will develop a deeper understanding of core related content. Peer teaching and peer interactions will improve social skills, interpersonal communication and personal connections to content knowledge. Students will engage in reading and writing for meaningful academic-based purposes, reinforcing literacy skills. Students will demonstrate knowledge gained throughout the unit in various ways, giving students differentiated opportunities to share their learning and achievements to promote student ownership.

This approach is unique because Kindergarten through fifth grade students have the opportunity to receive instruction in the science lab from a certified science professional based on each multi-aged trajectory. In addition, grade 4/5 math, language arts, and science are departmentalized in order to allow staff to focus their standards based planning and instruction on student needs in each specific area.

**School-wide Enrichment through Thematic, Student-Based Activities**

In addition to a focus on core academic subjects, we organize school-wide enrichment opportunities that are centered around a thematic unit of study or set of engaging enrichment activities. Students engage in these thematic activities once per week, during the “enrichment blocks” built into “Wacky Wednesdays.” This year, the focus was on national parks and students at each grade level worked on a variety of projects related to the history, use, and benefits of national parks. Teachers work together to organize school-wide activities such as plays, writing projects, and other activities, including field trips, giving students the opportunity to apply their knowledge in different ways. Instructional time during these enrichment blocks is generally supported by the “Specials” teachers such as the Art, Music, Science and Physical Education Teacher. This provides up to 80 minutes within the day for academic teachers to meet, collaborate, and plan together.

**Assessment**

At the Carlton Innovation School, assessments are intrinsically connected to daily instruction. Teacher observations and mini assessments, such as checklists, independence checks, and running records, are recorded on the standards continuum and collected in each student’s diagnostic portfolio along with work samples. In addition, when a student is ready to demonstrate mastery of a standard, the student is given a common assessment for that standard. Common assessments consist of assessments already used in the school such as Benchmark Assessment Kits and Math Unit tests, in addition to newly developed assessments based on the standards. The assessment results determine the student’s placement in small group instruction and the teacher’s goals for instruction the following day. These assessments are also shared with the students regularly.

During the course of the units, students will be assessed with standards based independence checks created by the Carlton Innovation School staff. Teams will create rubrics specific to Science and Social Studies content focused on the four language domains (listening, speaking, reading, writing) as well as the science and engineering standards of practice and the principles of inquiry. Considerations will be made to accommodate students who transition in fewer than 3 trimesters for Kindergarten and grade 3 and 6 trimesters in grades 1/2 and 4/5 from the previous grade level. In grade 4/5, based on the data gathered from the independence checks, science intervention will be given during the third trimester of the school year.

**Assessment and Instruction Cycle**

During the week before the start of school each student has an assessment appointment with his or her teacher or staff member designated as part of the Assessment Team. This helps the teacher create small group assignments and set progress goals for each student. By conducting the intricate assessments prior to starting school, class time dedicated to instruction can begin on the first day of school. Teachers choosing to participate in the assessment week will need to be paid a stipend of $1,200.
Because the Carlton Innovation School’s instructional approach and curriculum has changed significantly, this required us to change the way we communicate with parents about their child’s progress across the standard. In September 2013, we created a new, standards-based report card. However, since that time, we have self-reflected and discovered that the report is too in-depth for parents and caregivers. We are planning to create a committee to review and make revisions to our report card in order to make them more parent friendly and communicate progress more effectively.

**Timing of MCAS Administration**

Pursuant to MGL, Chapter 71, Section 92, and 603 CMR 48.03, innovation schools may propose innovations that may conflict with state laws or regulations governing other public schools. Following this, the Carlton Innovation School has submitted an inquiry to the MA Department of Elementary and Secondary Education to explore the possibility of adjusting the timing of MCAS administration for those students who complete a tested grade level during a different part of the year. The goal of this request is to allow students to be tested in a specific grade level as close to their timing of having completed that grade level as possible. While the traditional MCAS administration timeline aligns well with traditional schools, it does not align well to our trimester-based continuous progress model. With our model, a student may master and complete the requirements for 3rd grade (for example) in October, and move on to 4th grade in December of that year, following our trimester schedule. According to the traditional timeframe for testing administration, the student wouldn’t take the 3rd grade MCAS, however, until April or May of the following year, when they were well into the curriculum for 4th grade. The Carlton would like to explore the possibility of allowing students to take the MCAS within a timeframe that aligns with their matriculation to the next grade level. We believe especially that the advent of new technologies supporting state assessments should provide some opportunities for this flexibility. We look forward to working with both the district and the state to explore this possibility in the coming months and years.

**Meeting the Needs of All Students: Students with Disabilities and English Language Learners**

Currently, Carlton houses the district-wide Learning Skills substantially separate program for grades 1-5. In addition, the school also has an integrated kindergarten program. Both programs run on an August to June model. The students within these programs are truly a part of the Carlton community. They are integrated into homerooms for breakfast, morning meeting, specialists, lunch, recess, assemblies, and community circles. In both programs the amount of inclusion in core curricular blocks are based on each individual student’s needs and abilities.

To support a more inclusive model, students in the substantially separate classrooms are included in the regular education homeroom. By including these students within the regular education homerooms, the class size will remain manageable when students are mainstreamed for specialist or other areas that are appropriate, ensuring the best instruction for each and every student. However, these classrooms will use the same curriculum as the rest of the school with more specialized instruction as needed in small groups.

Inclusion students also benefit from the continuous progress structure and curriculum. Through flexible grouping and small group instruction, diverse learners such as Special Education Students and English Language Learners have targeted instruction that is differentiated based on their needs. Instruction is driven by assessment allowing students to move at their own pace through the continuum. Students continue to get the services outlined on their Individual Education Plans, but also benefit from more personalized instruction in the regular classroom. By using the standards continuum, expectations remain high and accommodations and modifications can be tracked closely and linked to student progress. These students would benefit from reinstating the Success Block because they would receive an extra dose.

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As the school works to fully use Aspen (the Student Information System, SIS), it is important to ensure that the sub-separate students are enrolled in homerooms scheduled with the sub-separate teachers.
of targeted small group instruction in the areas in which they need it the most outside of the school day. Should Success Block be implemented again, the school will ensure that all students have equal access to this opportunity.

Content lessons will be conducted in heterogeneous groupings that will encourage others with peer modeling. Lessons will take place in small groups in various settings, using multi-sensory activities and multi-generational interactions. Project-based learning allows students with disabilities and English language learners opportunities to demonstrate an area of strength not assessed in other core curriculum areas. In addition heterogeneous groups will provide ELL students and students with disabilities with opportunities for immersion in a language-rich environment, as well as opportunities to access vocabulary and build background knowledge. Standards based instruction during the content block provides all students with review, repetition, and reinforcement of concepts.

Our goal and philosophy at the Carlton Innovation School is based on a full-inclusion approach to serving students with disabilities. We believe that our inclusive framework for instruction and the continuous progress model that is based on meeting the individual needs of all learners are well-aligned. We hope to continue working closely with the district to ensure that the needs of all students are met and to achieve the best outcomes for all students. Over time, we hope to collaborate with the district to explore additional innovations that may improve supports for our students.

2. Schedule and Calendar

We seek to continue with the autonomies and flexibilities granted in the original innovation plan in the area of schedule and calendar. Specifically, we seek the following autonomies in these areas:

<table>
<thead>
<tr>
<th>Autonomy Area</th>
<th>Autonomies Requested</th>
</tr>
</thead>
</table>
| Schedule      | • The autonomy to establish the school’s daily schedule for students and teachers as needed  
                • The autonomy to establish the school’s own schedule and calendar for teacher professional development  
                • The autonomy to establish a schedule with increased common planning time for teachers |
| Calendar      | • The autonomy to establish the school’s schedule and calendar independent of the school district following the process outlined below  
                • The autonomy to request additional time from teachers in order to participate in the assessment camp, Success Block, and other activities taking place outside of the school schedule and calendar (teachers will be compensated accordingly) |

The school year for students will be the traditional 180 days (teachers work 185 days), however the school seeks the autonomy to establish the calendar independent of the district. Teachers shall continue to work the traditional 185 days for each school year with 180 days aligned to student instruction and five (5) additional days for professional development. The Carlton Innovation School has the autonomy to establish its own school calendar. The school recognizes, however, that there are benefits to having the ability to align their calendar with the district calendar, in order to better coordinate professional development, transportation, and other academic and/or operational elements. The process used to establish the school calendar each year will be as follows:

• Each year, the district will, by the end of January, establish a draft calendar
• The draft calendar will be shared with the school
• The principal will work with the school staff to review the draft district calendar and decide whether to adopt, adapt, or align the school’s calendar with the district’s calendar.
• The principal will present the final school calendar to the Carlton staff by February 15th to be voted on and passed with a 2/3 majority vote from professional staff.
• Following the vote, the final school calendar will be submitted back to the district for school committee approval.

Block Scheduling

One key component to continuous progress instruction is to have block scheduling, allowing for longer periods of time spent on instruction. This schedule will provide 80 minutes of math, 120 minutes of literacy, 40 minutes of science and social studies content, 40 minutes of physical education, art or music and 45 minutes for lunch and recess. Having uninterrupted blocks of instruction strengthens the team’s ability to meet the needs of the students. A sample student schedule is outlined below. The schedule depicts a typical student’s day for four days per week (Mondays, Tuesdays, Thursdays, and Fridays). Wednesdays, known as “Wacky Wednesdays,” are scheduled a little bit differently at our school. A sample schedule for “Wacky Wednesdays” is also below.

Sample Student Schedule (4 Days/week)

<table>
<thead>
<tr>
<th>Time</th>
<th>Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>8:05</td>
<td>Breakfast in the Classroom</td>
</tr>
<tr>
<td>8:20</td>
<td>Morning Meeting</td>
</tr>
<tr>
<td>8:40-10:00</td>
<td>Math</td>
</tr>
<tr>
<td>10:00-12:00</td>
<td>English Language Arts</td>
</tr>
<tr>
<td>12:00-12:15</td>
<td>Read aloud</td>
</tr>
<tr>
<td>12:15-1:00</td>
<td>Lunch and Recess</td>
</tr>
<tr>
<td>1:00-1:40</td>
<td>Art, Music or PE</td>
</tr>
<tr>
<td>1:40-2:20</td>
<td>Content</td>
</tr>
<tr>
<td>2:25</td>
<td>Bus/Pick –Up</td>
</tr>
</tbody>
</table>

Sample Student Schedule (“Wacky Wednesdays”)

<table>
<thead>
<tr>
<th>Time</th>
<th>Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>8:05</td>
<td>Breakfast in the Classroom</td>
</tr>
<tr>
<td>8:20</td>
<td>Morning Meeting</td>
</tr>
<tr>
<td>8:40-10:00</td>
<td>Enrichment Block</td>
</tr>
<tr>
<td>10:00-11:00</td>
<td>Math/ELA</td>
</tr>
<tr>
<td>11:00-11:45</td>
<td>Lunch and Recess</td>
</tr>
<tr>
<td>11:45-12:45</td>
<td>Math/ELA</td>
</tr>
<tr>
<td>12:45-2:20</td>
<td>Continue Enrichment Block with classroom teachers</td>
</tr>
<tr>
<td>2:25</td>
<td>Bus/Pick –Up</td>
</tr>
</tbody>
</table>

On “Wacky Wednesdays” students have the opportunity to participate in two “enrichment blocks” that provide them with opportunities to participate and engage in field trips and other student-centered activities organized around a theme. These enrichment blocks are coordinated and planned by the “specials teachers” and provide academic teachers with additional opportunities for common planning time.

Sample Teacher Schedule

<table>
<thead>
<tr>
<th>Time</th>
<th>Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>8:05 – 8:40</td>
<td>Common Planning Time (2 to 3 times per week)</td>
</tr>
<tr>
<td>8:40 – 10:00</td>
<td>Math</td>
</tr>
<tr>
<td>10:00 – 12:00</td>
<td>ELA</td>
</tr>
</tbody>
</table>
12:15 – 1:00 Lunch (recess duty 2 times per week)
1:00 – 1:40 Specials (prep)
1:40 – 2:20 Science/Social Studies
2:25 Duty – Bus duty, car pick-up, walker door, or hallway duty
2:35 Teachers leave for the day

Requesting Additional Time from Teachers

The school retains the autonomy to request additional days and hours of time from its teachers as needed to support various activities such as the summer assessment camp, Success Block, and other needs as they arise. Teachers will be compensated as outlined in the staffing section of this innovation plan.

**Summer Assessment Camp**

We will use five (5) days before school begins to assess each student during scheduled appointments. Teachers will be asked to work an additional week in the summer to support the assessment camp. This will be voluntary. Teachers choosing to participate will be compensated through a $1200 stipend.

**Optional Success Block**

Depending on the availability of funding, students at the Carlton Innovation School will have the option to extend their day before or after school with Success Block. In previous years, this was scheduled at the end of the day, from 2:35 to 3:35 pm. During Success Block, students receive an extra dose of intensive literacy or math instruction in small groups based on their diagnostic needs. Small groups will be taught by teachers opting to participate in the extended school day and will be compensated. This is to be negotiated with the Salem Teachers Union.

**3. Staffing**

We seek to continue with the autonomies and flexibilities granted in the original innovation plan in the area of staffing. Specifically, we seek the following autonomies in these areas:

<table>
<thead>
<tr>
<th>Autonomy Area</th>
<th>Autonomies Requested</th>
</tr>
</thead>
</table>
| Staffing      | • The autonomy to create new roles and job descriptions to support the implementation of the innovation plan (also agreed to with the 2013 Memorandum of Agreement with the STU)  
• The autonomy to hire and deploy an additional set of teachers in special roles (such as additional academic specialist roles) to implement simultaneous strands of small-group and individualized instruction throughout the day  
• The autonomy to deploy all teachers (core elementary, academic specialists, and specials teachers) in flexible ways to support ongoing small group instruction as well as daily common planning time  
• The autonomy to allow for up to 10 staff members to voluntarily participate in assessment camp for a stipend of $1,200. If more than 10 teachers choose to participate the 10 will be selected based on seniority.  
• The autonomy to pay teachers to work extra hours for “Success Block” tutoring, (teachers commit for a full trimester) at the forty-five dollar ($45.00) hourly rate |
Carlton’s Unique Staffing Model

Now that the school is fully enrolled with 260 students, and projected to be 270 for 2017-18, a unique staffing model has been designed to fully support and sustain the continuous progress model described in the innovation plan. A key part of the plan involves the ability to support multiple small group and individualized instruction, across grade levels and content areas, while at the same time supporting an adequate level of daily common planning time for all teachers. These elements provide the foundation for our school’s ability to truly individualize learning for each and every student, which is the cornerstone of our innovation plan. The staffing model that was funded for the 2017-18 school year, includes the following key roles (a comprehensive look at the staffing model can be found in Appendix C):

School Leadership, Operations, and Administrative Staff

- 1 Principal
- .4 Operational Leader
- .6 Literacy Coach
- 1 School Secretary
- .4 Lunch paraprofessionals (2 @ .2 FTE)

Instructional Staff

- 13 Core Elementary Teachers (includes 1 Integrated Kindergarten Teacher*)
- 6.8 Academic Specialist Teachers (2 Reading Specialists, 2.8 Math Teachers, 1 STEM Specialist (teaches .6 Science and .4 Math),* and 1 Flex Teacher)
- 2.2 Specials Teachers (6 Art, 6 Music, and 1 Physical Education; *Note: Both the Art and Music teachers are dual certified in Elementary Education and are deployed to teach Math groups for .4 FTE of their time, thus adding .8 FTE to the Math Teachers above).
- .4 ELA Tutor
- .8 Kindergarten paraprofessionals (2 @ .4 FTE)

Special Education Staff*

- 2 Sub-separate Special Education Teachers for the Learning Skills classrooms
- 2 Special Education Support/Inclusion Teachers
- 6 Paraprofessionals

ELL Staff*

- 1 ESL teacher

Other Student Support Staff*

- 1 School Nurse
- 1 City Connects Coordinator
- .5 School Adjustment Counselor
- 1 Speech Therapist
- 1 Behavior Specialist

This represents a total of 42.1 staff members supporting the instructional and social/emotional needs of students within the continuous progress model. This staffing model represents what we think is the most beneficial to serve the needs of our students. That said, the ability to fully sustain this staffing model as is, depends on the availability of resources at the district level combined with the school’s ability to leverage its budget autonomies. See page 44 for additional details regarding the availability of resources. A complete overview of the 2017-18 staffing model can be found in Appendix C. Note: Staff members with an * next to the title (or category) are deployed to the school by the district and not included in the calculation of the

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*8 For the FY18 budget, the Carlton Innovation School decided to reallocate the funds from their .8 FTE Assistant Principal to support the addition of 1.0 FTE Reading Specialist.
school’s lump sum budget allocation. For the two (2) Reading Specialists, 1.4 FTE of these positions shall remain budgeted and deployed by the district and .6 FTE of a Reading Specialist shall be part of the district’s lump sum budget.

**Additional Academic Specialist Teachers**

With student enrollment projected to be 270 for 2017-18, the total number of instructional staff members we need is approximately 21.8 staff members. These include 13 core Elementary “Homeroom” Teachers, 6.8 additional Academic Specialist Teachers, 2.2 Specials Teachers, and 1 part-time Tutor (.4 FTE) and 2 Kindergarten Paraprofessionals (2 at .4 FTE). The 6.8 Academic Specialist Teachers are key to our ability to support the continuous progress model based on small group “workshop” instruction that targets individual students’ learning needs. These teachers provide support to the core elementary teachers and enable the approach to small group, individualized instruction required for the continuous progress model to work. These positions currently include: 2 Reading Specialists; 2.8 Math Teachers (2 full-time and .8 additional gained by dual certified Art and Music Teachers who teach math for .4 (each) of their day); 1 STEM Specialist; and 1 Flex Teacher

The school acknowledges that while most elementary schools in Salem are supported by some of these additional positions (namely, in Salem, most schools have a reading specialist and a literacy coach), our school has had the benefit, on the basis of our original innovation plan, of having additional staff members who are either hired or deployed differently to allow the small-group instruction to work. We use the additional Academic Specialist Teachers as regular teachers in their content area. They each take full ownership of their ELA or Math groups and work collaboratively with the Core Elementary Teachers to develop the curricular (scope and sequence) trajectories and lesson plans in Reading, Writing, and Math. In addition, these academic specialists also work to develop the assessments used throughout the school to determine each student’s progress in learning. Descriptions of the role that each of these additional teachers play is provided below.

*Reading Specialists*

There will be two Reading Specialists employed at the school in 2017-18 (see Footnote #8, above). Next year, one will focus on students in the Kindergarten through Grade 2 (P1 and P2 cohorts) and the other will focus on Grades 3 through 5 (E1 and E2). In addition to managing their own teaching load of student small groups, the Reading Specialists will support other teachers with Reading and Writing curriculum planning as well as assessment development. These teachers will also have responsibility for any student interventions needed to support reading outcomes for students needing Tier 2 intervention.

*Math Teachers*

There are two full time Math Teachers at the school. They both serve as “Math Specialists” in a similar way that Reading Specialists do, providing support to the core elementary teachers of all grades. In addition, the school benefits from gaining an additional .8 FTE of Math Teacher time by deploying the dual certified Art and Music Teachers to teach Math small groups for .4 FTE of their time (each). An additional .4 FTE of math instructional time is also gained via the STEM Specialist who teaches .6 FTE of Science and .4 FTE of Math.

*STEM Specialist*

The STEM Specialist provides instructional support to all teachers to improve the delivery of science instruction across the school. Approximately .6 of this teacher’s time is spent supporting Science Instruction. In addition, this teacher spends .4 of his time teaching Math small groups.

*Flex Teacher*

The Flex Teacher is a unique role within the Carlton Innovation School. The person in this role serves as a flexible classroom teacher to support students who move up to the next cohort at a transition time creating a temporary “bubble” at a particular grade level. Because students will be transitioning to teams at three times throughout the year, we anticipate that our enrollment will balloon up in grades 1 and 2 this fall and
also in grades 3 and 4/5 later in the year. We need a classroom teacher who can teach all grades for some trimesters and particularly grade 4/5 during the spring trimesters as students who are ready for the transition to 6th grade prepare for the traditional September start of middle school. By creating this flex position this teacher can reinforce and extend student learning as well as prepare students for the transition.

These additional positions are an essential part of the continuous progress model that will be used for reading, writing, and math workshops each day. We found that we need 6 math teachers in both grades 1/2 and 4/5 to teach the six different trimesters incorporated within each multi-grade classroom.

Please see the staffing team chart in Figure 1, below for further clarification on how the additional ELA and Math support teachers are deployed. The staffing chart demonstrates how clusters of homeroom teachers (squares), and the ELA and Math support teachers and specialists will support two classrooms of students during the reading, writing and math workshop times.

*Figure 1: Carlton Staffing Chart to Support the Continuous Progress Model for ELA and Math*
The Role of Special Education Staff

Following the district’s practice, the number and type of special education staff members, including all teachers and paraprofessionals deployed to the school is determined by the specific needs and IEP requirements of our student body. Carlton hopes to collaborate with the district to discuss possible ways to increase the school’s flexibility to utilize some of the special education staff (such as inclusion teachers and/or some of the qualified paraprofessionals) in innovative ways without compromising the services provided to students with IEPs.

Compensation for Additional Staff Time

Teachers working at the Carlton will have the following optional opportunities to earn additional income:

- Teachers choosing to participate in the assessment week will need to be paid a stipend of $1,200
- Teachers working additional hours after the school day will be paid $45 per hour

Sustaining our Staffing Model

Our ability to sustain the staffing model in future years will depend on a number of factors including the level of enrollment within the school combined with the funding levels we receive, annually, from the district and potentially other sources. Our ability to fully sustain our unique staffing model will depend on the funding available to us each year. We hope to utilize the budgetary autonomies described in this innovation plan to meet our ongoing needs as a school. For the moment, we strongly believe that this is the best approach to supporting our school, but do request the autonomy to deploy resources each year in flexible ways that support any necessary adjustments or changes to the staffing model. In doing so, we will work collaboratively with the district and follow all required contractual agreements concerning existing staff members. As resources allow, we may combine or create new positions as the needs of our students and our ability to “innovate” to respond to their needs evolves.

4. Professional Development

We seek to continue with the autonomies and flexibilities granted in the original innovation plan in the area of professional development. Specifically, we seek the following autonomies in these areas:

<table>
<thead>
<tr>
<th>Autonomy Area</th>
<th>Autonomies Requested</th>
</tr>
</thead>
<tbody>
<tr>
<td>Professional</td>
<td>• The autonomy to design and schedule our own calendar and focus for teacher professional development</td>
</tr>
<tr>
<td>Development</td>
<td>• The autonomy to attend district professional development or to utilize district professional development time for our own specific needs.</td>
</tr>
<tr>
<td></td>
<td>• The autonomy to schedule professional development that may be different from the district to allow for the differentiation of staff needs regarding curriculum and assessment.</td>
</tr>
</tbody>
</table>

Professional development is an important part of building on what we have accomplished as an innovation school. As we move forward, there is a definite need to continue with professional development around the following areas:

1. Reading and Writing workshops
2. The use of assessment tools to plan instruction
3. Differentiated workshops focusing on curricular resources and academic talk to support staff in teaching the mathematical practices
4. Inquiry based instruction in science and social studies
5. Team teaching and collaboration
6. Data collection and analysis
7. New staff training and ongoing small group professional development

Ongoing Professional Development will be provided through:
- Common Planning Time
- Conferences and Workshops
- Professional Development full and half days.

As an Innovation School, Carlton will have the autonomy to attend district professional development or to utilize district professional development time for its own specific needs. In instances when the school chooses to schedule and offer its own professional development separate from the district, the costs of the professional development will be paid for through the school’s budget. The leadership team will make individual determinations as to the relevance of district professional development as they are scheduled.

5. District Policies and Procedures

We seek to continue with the autonomies and flexibilities granted in the original innovation plan in the area of district policies and procedures. Specifically, we seek the following autonomies in these areas:

<table>
<thead>
<tr>
<th>Autonomy Area</th>
<th>Autonomies Requested</th>
</tr>
</thead>
</table>
| District Policies and Procedures   | Governance
- The autonomy to establish a leadership team who will work closely with the school council and principal to establish goals for the school |
|                                    | Student Assignment/Kindergarten Enrollment
- The autonomy to enroll Kindergarten students in three trimester “waves” based on the timing of their 5th birthday (before September 1 for the Fall Trimester, before December 1 for the Winter Trimester, and before March 1 for the Spring Trimester) -- as opposed to one enrollment period for the full kindergarten class in the fall (partial autonomy to SC Policy 5103) |
|                                    | Grading, Student Promotion and Matriculation
- The autonomy to transition and/or matriculate students from one grade-level to the next when they are ready, based on each student’s demonstrated mastery of learning the standards for that grade level – as opposed to the traditional matriculation schedule where students transition to the next grade in the fall each year
- The autonomy for teachers to work collaboratively to assess each students’ mastery of the standards and determine their readiness to transition from one grade level to the next at three different points in the year – as opposed to traditional grading practices and timelines |
|                                    | Student and Faculty Handbook
- The autonomy to create our own student and faculty handbooks |
The Carlton Innovation School will need flexibility with the following district policies:

**Governance**

Carlton Innovation School is dedicated to students, and none of that would be possible without the continued support and leadership of staff. All staff at Carlton have been central to the design and creation of this innovation plan. A Leadership Team has been established which allows for a regular meeting time for teacher and staff representatives to meet with the principal for the purpose of communicating staff and student needs, evaluating the success of educational practices, and identifying professional development needs. The Carlton Innovation School has an active school site council which includes six parents and six teachers as well as one community member. This group meets monthly and this year has focused on the development of the innovation renewal plan and reviewing the school’s budget. In the future, this group will serve as an advisory group to the principal, supporting the school’s budget and other autonomies, cultivating community partnerships, and other supports over time.

**Student Assignment Policy -- Kindergarten Enrollment**

Over the next five years, we seek to continue with the previously agreed adjustments to the kindergarten registration and enrollment process. Specifically, this is a partial autonomy from School Committee Policy 5103, which is the district’s student assignment policy. For the Carlton, Kindergarten students begin school on a trimester basis, based on a student’s birthday, as opposed to the traditional September start for all students. Kindergarten students are eligible to enroll at the Carlton School for the trimester after they have turned five years old. Students need to be five years old prior to September 1st to begin school for the Fall Trimester, five years old prior to December 1st to begin school for the Winter trimester, and five years old prior to March 1st to start kindergarten for the Spring trimester (see Appendix B for additional information). We will work collaboratively with the Superintendent and the district’s Parent Information Center (PIC) to continuously assess, monitor and improve communications to ensure successful implementation of these procedures. In particular, we will work with the Superintendent to establish a process for accurately estimating and identifying the number of students who will be “transitioning” from one grade level to the next, prior to the start of each trimester. This will help ensure that the PIC identifies an accurate number of seats available for new kindergarten students (or students entering at other grade levels) to enroll. We hope to ensure that this communication occurs earlier in the process at each transition point to ensure that all factors are considered and communicated clearly prior to sharing the information with parents and families. In addition, the communication is key to ensuring that all students are allowed time to make progress and move when ready rather than a yearly transition. Therefore, a varying number of seats will be available each trimester after it is determined how many students are ready to move on to grade 1/2.

**Grading, Student Promotion, and Matriculation**

A student’s academic progress will determine advancement to the next team based on benchmark mastery, social and emotional benchmarks, as well as chronological age. For example, the experience of one student illustrates this autonomy over the last two years. Last school year we had a student that moved to E1 (3rd grade) in March 2016 (as opposed to the following September) because he was above benchmark in all academic areas. The P2 (second grade teachers) felt he was ready for the next level. However, the teachers in E1 found him to be academically higher than the students in their classrooms but socially, he was young. The team decided that the best thing for this student would be to stay in E1 for four trimesters (March 2016 through March 2017) so that he could gain the maturity that he was lacking. We still made sure to teach this student where he was, but made sure to incorporate the social skills he was lacking. In May 2017, this student was receiving math instruction at the trimester 3, fifth grade level, and ELA at the beginning of fifth grade. This student will be transitioning to E2 in August 2017. In addition, he has matured tremendously and may be ready for many 6th grade skills before the end of next school year. This is different from the district’s traditional grade designations and school calendar.
Beginning in FY18, the school will be fully utilizing the district’s new Student Information (SIS) System, Aspen. To do this, Carlton staff members will need to be trained in this system as all other school staff in the district received in FY17. The district agrees that Carlton staff is entitled to all of the training and support in the foundational use and application of the Aspen system as all other schools in the district. As such, the district agrees to pay the cost of this level of training and support. To fully utilize Aspen for the report card, however, some customization and adaptation of the system may be required, in order to ensure that the Aspen system can support the school’s continuous growth model. The school will collaborate with the district to determine what will be needed to fully utilize Aspen for the Carlton model. The school agrees to pay the costs for any customizations that will be required.

**Student Handbook and Faculty Handbook**

The Carlton Innovation School seeks the autonomy to create its own handbook(s) for students and faculty. We will ensure that all required sections of the student and faculty handbook are incorporated. Each year, we revisit the handbook and adjust policies and procedures as needed.

**Use of Facility**

The Carlton building currently houses one Head Start classroom. As student enrollment continues to increase it is difficult to accommodate the amount of space required for instruction without the use of this additional classroom. We look forward to working with the district to identify opportunities to either relocate this classroom or develop alternative solutions to our need for additional instructional space.

6. **Budget**

The original Carlton Innovation Plan did not contain explicit budget autonomies, but did identify a number of additional staffing roles and positions that were to be funded to support the start-up and implementation of the innovation school. As we look to the next five years of implementation and sustainability as an innovation school, we seek the opportunity to sustain our continuous progress model with an appropriate level of staffing. To do so, we seek to operate with the following budget autonomies:

<table>
<thead>
<tr>
<th>Autonomy Area</th>
<th>Autonomies Requested</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Budget</strong></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• The autonomy to receive an annual, “lump sum budget” that is based on the 2017-18 approved budget, enrollment, and staffing levels</td>
</tr>
<tr>
<td></td>
<td>• The autonomy to have the “lump sum” budget adjusted each year based on the school’s future-year enrollment projections. Enrollment projections shall be based on the previous year’s average enrollment, October and April.</td>
</tr>
<tr>
<td></td>
<td>• The autonomy to collaborate with the district to identify potential discretionary services that the school may “opt out of” in exchange for additional budget dollars</td>
</tr>
<tr>
<td></td>
<td>• The autonomy to allocate the school’s lump sum budget to support and sustain the school’s staffing model as determined annually by the school’s principal and leadership team.</td>
</tr>
<tr>
<td></td>
<td>• The autonomy to budget based on teachers’ actual salaries</td>
</tr>
<tr>
<td></td>
<td>• The autonomy to allocate funds to support additional teacher stipends for extra time and participation in the assessment camp, Success Block, Leadership Team or other purposes as needed.</td>
</tr>
<tr>
<td></td>
<td>• The autonomy to raise and spend funds from grants, private foundations, and third-party sources</td>
</tr>
<tr>
<td></td>
<td>• The autonomy to establish a 501-c-3 nonprofit organization to, among other things, serve as a fundraising arm for the long-term sustainability of the school</td>
</tr>
<tr>
<td></td>
<td>• The autonomy to retain (carry over) unspent funds from one fiscal year to the next</td>
</tr>
</tbody>
</table>
Annual Lump Sum Budget Allocation

Instead of building the school’s budget each year according to the traditional method of determining the school’s personnel and non-personnel costs, we seek the autonomy to receive an annual allocation of a “lump sum” amount that is mutually agreed to by the school and the district based on the below factors. We recognize that the district may, at some point in the future, develop a new, student-based methodology for allocating resources to its schools. Until that is finalized, we have collaborated with the district on the following resource allocation methodology:

Beginning in FY19, the annual lump sum amount will be based on the total funding approved and allocated to the school for FY18 (School Year 2017-18), which is based on a total projected enrollment of 270 students. For FY19 and until such time as the district changes its funding methodology for all schools, the lump sum amount shall be calculated based on the following:

1. The total amount budgeted for 2017-18 non-personnel and stipend costs

2. The total amount budgeted for 2017-18 salaries of school leadership and instructional staff members as described in the above staffing section (with the exception of 2 Reading Specialists and 1 STEM Specialist, who shall remain budgeted and deployed by the district, as these are funded through external sources). To calculate salaries for the lump sum, the following methods of calculating salaries will be used:
   a. The actual FY18 salaries of the school leadership and non-teaching instructional staff members shall be used
   b. For instructional staff members who are teachers, the FY18 school’s average teacher salary ($62,685 for FY18) shall be used

3. Each year, the lump sum will increase to cover the cost of contractual obligations for all personnel. For teaching staff who are included in the lump sum calculation, the lump sum budgeted allocation will increase by 3.51% (which is the average for all step increases) plus the agreed upon annual salary increase in the STU contract (2.5% for FY19). The lump sum allocation for the remainder of the personnel will be increased in accordance with increases approved by the School Committee for similar personnel in the district.

4. The salaries in the staffing categories of Special Education, English Language Learner, and Other Student Support staff as described in the staffing section, along with the salaries of the 2 Reading Specialists and STEM/Science Specialist shall be excluded from the school’s annual lump sum allocation. These salaries and positions shall remain budgeted at the district level and staffing levels determined at the district level based on students’ IEP, language support, behavioral, or other needs at the school as well as the availability of external sources of funding.

5. For future years and so long as this methodology remains, the future-year lump sum budget shall be based on the previous fiscal year’s salary levels.

6. This methodology for allocating resources to the school shall be reviewed annually and both parties will collaborate to address any concerns that may arise.

The below formula depicts the method for calculating the “Annual Lump Sum Allocation”:

\[ \text{Personnel Lump Sum} = (FY18 \# \text{ of Instructional Teaching Staff Members Approved} \times FY18 \text{ School’s Avg Teacher Salary}) + \text{Other Instructional Staff member salaries} + FY18 \text{ School Leadership Staff Actual Salaries} \]

\[ \text{Non-Personnel Lump Sum} = FY18 \text{ Non-Personnel} + FY18 \text{ Stipend Allocation} \]
Annual Lump Sum Allocation = \((\text{Personnel Lump Sum Allocation} \times \% \text{ approved annual increase for contractual obligations}) + \text{Non-Personnel Lump Sum}\)

Adjustments Based on Enrollment

The lump sum budget will be adjusted annually based on the school’s ability to maintain or increase student enrollment. Specifically,

- If the school projects to enroll 20 additional students than the previous year (with at least \(\frac{1}{2}\) of these in Kindergarten), an additional amount equivalent to the average salary for 1 teacher will be added to the lump sum budget for the following year.
- If the school projects to enroll 20 or fewer students than the previous year, an amount equivalent to the average salary for 1 teacher will be deducted from the lump sum budget.

Enrollment projections will be based on the district’s methodology, but will use the average of the October 1 and April 1 enrollment figures (rather than just the October 1 numbers) (the enrollment numbers for the spring must be based on enrollment after the students transition and/or are enrolled for the Spring Trimester). The projections will be determined in collaboration with the Superintendent and Business Manager by February of each year and in advance of the budget approval process. A key factor to be taken into consideration will be the number of Kindergarten seats available for the upcoming year, especially in the Fall Trimester, which tends to have a greater level of demand than the Winter and Spring trimesters.

Adjustments Based on Availability of External Source Funds

As with all public school funding, the ability to maintain a budget supporting specific positions depends on the availability of funding. While the bulk of Salem’s and Carlton’s budget comes from a combination of state and local funding, some positions are funded through external sources of funding, such as Title I or other federal funding, and other sources. All staff members currently funded through the special education budget of the district’s Pupil Personnel Services (PPS) office are excluded from the lump sum budget. The district will continue to apply for and manage all special education entitlement grant money and deploy these resources to schools based on student needs.

Allocation of Title I resources also depend on each school’s enrollment levels and concentration of high need students, and thus can shift across the district to support the high need students in the schools where they are enrolled. Two positions funded through Title I projected at the Carlton for FY18, specifically, fall into this category (2 Reading Specialists). An additional position (1 STEM/Science Specialist) is funded through a private foundation. The salaries for each of these positions are excluded from the calculation of the school’s lump sum budget and the ability to continue supporting these positions at the school depends on the continued availability of these external sources at the current level(s). these external sources at the current level(s).

Adjustments Based on Major Changes to District Funding

It is key to note that the district can only support the above approach to resource allocation if it has the revenue available to do so. Should a major change to either the Chapter 70 state funding allocation, local contribution, or other source occur, adjustments to the resource allocation methodology for the Carlton as well as all schools in the district, will need to be made.

Use of Funds Allocated through the Lump Sum Budget

The Carlton Innovation School seeks the autonomy to use and deploy the funding available via the lump sum budget to support and sustain a staffing model that best serves the needs of the school. As such, the school seeks the autonomy to use the resources in flexible ways to combine or create staffing positions that best meet student needs. Funding to support any teacher stipends and/or hourly rate for additional time worked will also come out of the school’s lump sum budget.
**Budgeting Based on Teachers’ Actual Salaries**

As stated above, the lump sum budget supporting the school’s instructional staff members will be calculated based on the total number of instructional staff members multiplied by the school’s average for teacher salaries (in FY18 the average salary for teachers at the Carlton is: $62,685). Within that total allocation, however, the annual Carlton Innovation School Budget will use teachers’ actual salaries to develop its annual budget. Thus, if a teacher’s salary is less than the district average (e.g., $48,000), the school shall retain the difference between the average salary for teachers and the actual teacher’s salary (e.g., $62,685 - $48,000 = $14,685). This represents a “savings” that the school may reinvest toward other staff salaries or other purposes as determined by the school.

Conversely, if a teacher’s salary falls above the average district salary (e.g., $75,000), the school must absorb the difference between that teacher’s salary and the average out of its lump sum budget. For example, (e.g., $75,000 - $62,685 = $12,315) the school must find $12,315 elsewhere in the budget to support that teacher’s salary.

**Opting out of Discretionary District Services**

While the district does not currently offer schools the ability to opt out of specific services in exchange for funding (based on a per pupil amount), the Carlton hopes to participate in future conversations to collaborate with the district to explore this possibility. In the meantime, the Carlton Innovation School will de-prioritize the need to purchase district curriculum workbooks in certain grade levels and, instead, use these funds to pay for alternative materials. We will also be drawing from more than one program resource and developing our own flexible curriculum. In recent years, there have been several examples where the school has opted not to use district purchased materials (or, to use far fewer of them than other schools). We think that this type of situation reflects a potential opportunity to discuss the merits of opting out of these “district services” in exchange for additional funding that, as an autonomous school, could be used in other ways to support the school. We look forward to the opportunity to explore this type of innovation in the future.

**External Sources of Funds and Establishing a 501-c-3 Non-profit Organization**

We seek the autonomy to raise and spend funds from external sources such as grants, private foundations, individuals, and other external sources including anonymous sources. In addition, we seek the autonomy to explore the possibility of establishing a 501-c-3 nonprofit organization to, among other things, serve as a fundraising arm for the long-term sustainability of the school.

**Retention of Unspent Funds**

As specified in MGL 71, Section 92 b, an innovation school “may retain any unused funds and use the funds in subsequent school years.” The Carlton Innovation School seeks to explore the possibility of obtaining this autonomy in its innovation renewal plan. Having this ability will allow the school to maintain and re-invest any savings resulting from staffing transition or other shifts to be re-invested in the future of the school. We look forward to collaborating with the district to identify the feasibility and best approach to leverage this opportunity to support the future of our school over the long-term.

---

9 See: [https://malegislature.gov/Laws/GeneralLaws/PartI/TitleXII/Chapter71/Section92](https://malegislature.gov/Laws/GeneralLaws/PartI/TitleXII/Chapter71/Section92)
V. Capacity of Applicant Group

The Carlton Innovation Plan Committee is fully committed to supporting the success of the Carlton Innovation School. The resumes of key IPC members can be found in the Appendix.

VI. Measurable Annual Goals

The Carlton Innovation School will focus on the following Measurable Annual Goals (MAGS) over the next five years. The annual evaluation will provide updated measures showing progress and areas for improvement in each of the below areas.

<table>
<thead>
<tr>
<th>MAG Category</th>
<th>Measure</th>
<th>Baseline Data (2015-16)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Student Attendance</td>
<td>% student attendance</td>
<td>94.3</td>
</tr>
<tr>
<td></td>
<td>% chronically absent</td>
<td>16.4</td>
</tr>
<tr>
<td>Student Safety and Discipline</td>
<td># high needs students with reportable discipline incidents</td>
<td>7</td>
</tr>
<tr>
<td></td>
<td>% out of school suspension</td>
<td>2.7</td>
</tr>
<tr>
<td>Student Promotion &amp; Graduation</td>
<td>% of students repeating a grade</td>
<td>.6</td>
</tr>
<tr>
<td></td>
<td>[school defined measure??]</td>
<td>??</td>
</tr>
<tr>
<td>Student Achievement in MCAS</td>
<td>ELA CPI for all students</td>
<td>86.8</td>
</tr>
<tr>
<td></td>
<td>Math CPI for all students</td>
<td>83.5</td>
</tr>
<tr>
<td></td>
<td>ELA SGP for all students</td>
<td>59</td>
</tr>
<tr>
<td></td>
<td>Math SGP for all students</td>
<td>34.5</td>
</tr>
<tr>
<td>Progress in Areas of Academic Underperformance</td>
<td>Science CPI for all students</td>
<td>80.6</td>
</tr>
<tr>
<td>Progress among subgroups of students</td>
<td>ELA CPI for high needs students</td>
<td>83.1</td>
</tr>
<tr>
<td></td>
<td>Math CPI for high needs students</td>
<td>78.2</td>
</tr>
<tr>
<td></td>
<td>ELA SGP for high needs students</td>
<td>59</td>
</tr>
<tr>
<td></td>
<td>Math SGP for high needs students</td>
<td>34</td>
</tr>
<tr>
<td></td>
<td>Science CPI for high needs students</td>
<td>73.8</td>
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<tr>
<td>Reducing Achievement Gaps</td>
<td>Reduced achievement gap between white and non-white students on ELA CPI</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Reduced achievement gap between white and non-white students on Math CPI</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Reduced achievement gap between white and non-white students on Science CPI</td>
<td></td>
</tr>
<tr>
<td>School Defined Measures</td>
<td>• The percentage of students scoring at advanced or proficient in both ELA and Math MCAS will increase with a target of 10% each year.</td>
<td>89% of students in grades 3-5 have made one year growth on common assessments given during the school year.</td>
</tr>
<tr>
<td></td>
<td>• Students will make at least one full year of growth on the standards continuum as measured by common assessments.</td>
<td></td>
</tr>
</tbody>
</table>
APPENDIX A: RESUMES OF APPLICANTS

Bethann Jellison

Massachusetts Teacher Certifications: Principal/Assistant Principal Pre K-6 Pending, Elementary (1-6), Middle School 5-8, SEI endorsed
Certificate Number: 378332

EDUCATION

Salem State College
Salem, MA 01915
Master of Education
Successfully completed and passed all MTELs and comp exams
Jan. 2001 – May 2002

Merrimack College
Andover, MA 01845
Bachelor of Science Degree in Accounting
Sept. 1987 – May 1991

Professional Teaching Experience

Salem Public Schools
Carlton Innovation School
10 Skerry Street, Salem, MA 01970

Principal

• Use instructional leadership skills to implement Massachusetts Teacher Evaluation system with consistent feedback to teachers increasing effectiveness of instruction.
• Lead staff in Standards-Based instruction and grading using multiple student achievement data points to make daily, weekly, monthly, and yearly instructional decisions.
• Establish a positive school culture and climate using components of Responsive Classroom and Positive Behavior Intervention and Support, helping staff to collaboratively select, teach and reinforce the Carlton core values: Effort, Curiosity, and Community.
• Lead professional development for teachers on a range of topics, and developed a comprehensive professional development system that is responsive to student and staff needs.
• Lead staff to rewrite the Carlton Innovation Plan.

Math Teacher – Grades 3 – 5

• Responsible for teaching the CCSS math curriculum to groups ranging from 12 to 22 students in grades 3 – 5.
• Created math curriculum and trimester trajectories for grades 3 – 5 based on the CCSS using a variety of resources, not a prescribed program.
• Provided diagnostic instruction by meeting the students where they are based on daily informal and formal assessments.
• Planned for and lead weekly Common Planning Time meetings for Grades 3 -5 math teachers.
• Interpreted data and created groups based on that data for grades 3 -5.
• Helped to develop our school’s current math curriculum while transitioning to standards based instruction.
• Created and implemented independence checks and assessments for grades 3 -5.
• Created and implemented rigorous teaching plans with high expectations for all students.
• Created and provided Professional Development to my school on Mathematical Practices.
• Worked with administration on several projects like: helping to write the original and now revised version of our school’s innovation plan, standards based instruction and grading, generating assessments, and creating and administering PD.
• Served as building representative for the Salem Teacher’s Union.
• Member of our school Instructional Leadership Team, and Data Team

Grade Three and Five Classroom Teacher
• Developed and implemented daily lesson plans and weekly units.
• Administered assessments and then readjusted lessons to re-teach needed material.
• Analyzed student performance daily.
• Conducted differentiated group/individual reading, math, science, and social studies activities based on student needs.
• Fostered a classroom environment conducive to learning and promoting excellence.
• Participated in faculty and parent conferences.
• Created an open door of communication for all.
• Administered guided reading along with a balanced literacy approach to literacy.

Title I Reading Teacher
• Worked with struggling readers to help provide support both in and out of the classroom through guided reading lessons.
• Implemented lesson plans that actively moved through the four domains of reading, writing, listening, and speaking.
• Administered the Benchmark Assessment System (BAS) and other assessments at the time including: Developmental Reading Assessment (DRA) and DIBELS as well as initial kindergarten screening.
• Participated in school-wide professional development.

Other Work Experience

US Department of Education
Boston, MA

Senior Auditor/Auditor in Charge
• Conducted compliance audits of schools and grantees receiving assistance from the US Department of Education.
• Established audit objectives consistent with audit work plans for audits in accordance with ED OIG and GAO standards.
• Arranged for staff and other resources appropriate
• Assured audit steps were completed and adequately documented.
• Prepared draft and final audit reports.
• Temporarily assigned as a trainer/consultant for all Puerto Rico staff.
• Trained all staff on Direct Loan audits and then assisted with many audits in Puerto Rico to make sure staff were up to date with all guidelines.
• Recognized for my efforts by the Deputy Inspector General for Audits.
Meredith McKenna

Professional Teaching History

**Grade 1 and 2 Teacher**
Carlton Innovation School- Salem, MA  Aug 2012-Present
Developed and taught lessons for a diverse, multi-grade classroom, ranging in size from 18 to 21 students in all core content areas. Utilized the workshop model in ELA and math. Taught guided reading groups to a range of readers from levels A- S. Used Lucy Calkins readers and writers units of study as a resource to develop trajectories and lessons based on student need. Differentiated instruction for students in all content areas. Collaborated with colleagues weekly to adjust practice based on data. Coached teachers in Readers and Writers workshop as well as behavior management to refine practice and increase student learning. Used the Fountas and Pinnell Benchmark Assessment System twice a year and on-going running records to monitor student progress towards achieving or surpassing reading benchmarks. Used the Next Generation science standards as well as Stem Scopes to develop hands-on learning experiences in science. Certified ALiCE trainer for Salem Public Schools. Building union representative. A member of the school council, which is a group of parents and teachers that meet to discuss school wide issues and concerns. Interview committee member for hiring perspective staff in multiple grade levels at Carlton School. Active member of the Carlton community extra curricular events.

**Grade 3 and 4 Long-Term Substitute Teacher**
Saltonstall- Salem, MA  April 2012- July 2012
Took over classroom responsibilities during a maternity leave. Planned and implemented lessons in all subject areas. Met with parents to discuss concerns and progress. Attended faculty meetings, professional development opportunities, and collaborated with staff to improve practice and student achievement.

**Kindergarten Paraprofessional**
Carlton School- Salem, MA  October 2011-April 2012
Worked primarily with a group of 4 Kindergarteners in the regular education setting. I supported these students to help work through their academic as well as behavioral difficulties. I applied scaffolds as needed to aid in their ability to access the curriculum. I also facilitated their individual behavior plans developed by their teacher and behavior specialist. Administered running records and the K/1 Inventory to monitor student progress.

**Education**
Masters of Reading
Salem State University  May 2015

Bachelor of Science
(Elementary Education Concentration)
Salem State University  May 2011

**Certifications**
SEI endorsed
Licensed elementary 1-6 teacher
Reading Specialist certification: pending

**References**
1. Richard Giso
1st and 2nd grade teacher
Carlton Innovation School
617-610-5437

2. Tracy Angeramo
K, 1, 2, 3 Math teacher
Carlton Innovation School
978-996-2738
Tracy Angeramo

Massachusetts Teacher Certifications: Elementary (1-6), Special Needs (N-9), SEI endorsed
Certificate Number: 321178

EDUCATION

Endicott College
Beverly, MA 01915
► M.Ed. in Reading and Literacy
Successfully completed and passed all MTELs and comp exams

Salve Regina University
Newport, RI 02840
Sept. 1990 – May 1994
► Bachelor of Science Degree in Special and Elementary Education
► Graduated Cum Laude
► Member of Sigma Phi Sigma, Sisters of Mercy Honor Society

WORK EXPERIENCE

Salem Public Schools
Carlton Innovation School
Sept. 2013 – present
► Math Teacher – Grades K - 3
► Responsible for teaching the CCSS math curriculum to groups ranging from to 22 students in grades K – 3
► Create math curriculum and trimester trajectories for grades K – 3 based on the CCSS using a variety of resources, not a prescribed program
► Provide diagnostic instruction by meeting the students where they are based on daily informal and formal assessments
► Lead weekly Common Planning Time meetings for the Kindergarten, Grade 1, and Grade 2 math teachers
► Helped to develop our school’s current math curriculum while transitioning to standards based instruction
► Created and provided Professional Development to my school and the district on Talk Moves, Mathematical Practices, and Number Talks
► Worked with administration on several projects like: helping to write the original and now revised version of our school’s innovation plan, standards based instruction and grading, generating assessments, and creating and administering PD
► Member of our school Instructional Leadership Team, and Data Team
► Provide math PD for new teacher training

Carlton School
Sept. 2008 – June 2013
► First Grade Teacher
► Responsible for up to 25 students
► Administered guided reading along with a balanced literacy approach to literacy
► Responsible for administering science, social studies, language arts and math curriculums based on district and state standards
► Provided differentiated instruction for all students including ELL and special education needs
► Worked collaboratively with special education staff, SEI teacher, ESL tutor, reading specialist, and adjustment counselor for effective inclusion and pull out services
► Provided ongoing parent communication through classroom letters, email, phone calls, notices and school-wide newsletters
Administered the Benchmark Assessment System (BAS), and other literacy assessments popular at the time, such as, the Developmental Reading Assessment (DRA), and DIBELS

Participated in many district-wide committees working collaboratively with district staff regarding the improvement of math instruction and early childhood education

**Triton Regional School District**

**Special Education Teacher – Grade 3**

- Member of the grade 3 team and co-taught within an inclusion model
- Exposure to and participated in *Responsive Classroom* techniques
- Teach the *Wilson* reading approach to several small groups
- Developed and implemented Individual Education Programs (IEPs), and administered, interpreted and wrote reports based on formal and informal assessments

**Salem Public Schools**

**Special Education Inclusion Specialist – Grades K - 2**

- Serviced special needs students in an inclusive setting, as well as integrated groups, one-on-one and small group instruction
- Developed and implemented IEPs using *eSped*
- Collaborated with school principal as *MCAS coordinator* to prepare and organize all testing materials, special education students’ test accommodations, scheduling, and small group/1:1 assignments
- Provided all academic assessments for initial, annual, and three year re-evaluations
- Experience teaching and supplementing the math curriculum with *TouchMath*, as well as initiated and provided a TouchMath workshop to fellow colleagues
- Provided specialized instruction using Lindamood Phoneme Sequencing (LiPS), *Wilson* reading, the *Orton-Gillingham* approach, Nanci Bell’s Visualizing and Verbalizing (VV), as well as integrated *guided reading* groups in collaboration with classroom teachers
- Member of school’s Fall Kindergarten screening team
- Initiated, developed, and provided free one-on-one summer literacy tutoring to the Carlton School Kindergarten class in 2005, and grades K through 4 in 2006

**Commonwealth Learning Center**

**Teacher/Tutor – Grades 1 - Adult**

- Taught reading, writing, math and study skills in a one-on-one setting using a variety of structured, multi-sensory programs
- Trained in *Lindamood Phoneme Sequencing™* Program, Nanci Bell’s *Visualizing and Verbalizing™* Language Comprehension Program, the *Orton-Gillingham* approach to decoding and encoding, and the *Wilson Reading System*
- Wrote student reports of instructional progress
- Administered informal and formal assessments as needed

**Reading Public Schools**

**Resource Room Teacher – Grades 1-3**

- Member of Child Study Team handling special education referrals, initial evaluations, annual reviews and three year re-evaluations
- Developed and implemented Individual Education Plans (IEPs)
- Co-Taught within an inclusive setting, as well as provided integrated groups, one-on-one and small group instruction
Assisted classroom teachers in modifying and adapting classroom curricula in all areas

Experience administering, interpreting, and writing reports for many norm-based assessments

Working with the Principal and fellow colleagues, was an integral member in creating a school-based common planning time between the special and regular education teachers

Initiated and helped create a school-based Teacher Assistance Team (TAT) to better establish a pre-referral process

Extended School Year summer tutor for special needs students (Grades 2 – 9)

Silver Lake Regional
School District
Kingston Elementary

School
Kingston, MA 02364

Substantially Separate Special Needs Teacher – Grades 1-3

Responsible for individualized math and reading instruction

Developed and implemented IEPs, and assessed students for annual and three year evaluations

Responsible for instructional aide and twelve students with varying needs such as ADD/ADHD, developmentally delayed, Down’s Syndrome, and emotional disabilities
**APPENDIX B: CARLTON KINDERGARTEN REGISTRATION INFORMATION**

Dear Parent(s),

This packet contains a kindergarten application and related materials for the Carlton Innovation School Continuous Progress Program. We ask that you complete this information and return it to the Parent Information Center. All assignments to Carton Elementary School will follow the Salem School Committee’s Assignment Policy. School assignments are based on the information you provide to us via these materials. We hope that the following information helps to answer some of your questions about the registration process.

With regard,

*Sayonara Reyes*

Sayonara Reyes
Manager/Assignment Officer

---

**How do I enroll my child in the Salem Public Schools?**

Submit a kindergarten assignment application to the Parent Information Center. An assignment application is enclosed along with an addressed return envelope. Enrollment is a three-step process:

**Step 1.** Your Child must turn 5 by the required date.

**Step 2.** Complete all forms in the kindergarten packet and submit all required documents to PIC. PIC will follow district policy to assign your child and inform parents of assignment by mail. Upon receipt of your child’s assignment, please confirm assignment by sending the confirmation form back to PIC.

**Step 4.** Assignment applications will NOT be processed without the required documents.

---

**What documents do I need to submit with my application?**

- **Proof of address (two of the following documents):**
  - Lease or mortgage statement in parent’s/guardian’s name: current electric, gas, cable, water, or telephone bills in parent’s/guardian’s name.
  - If you do not have any utilities under your name and you reside with a family member or friend: We need a notarized letter from the person you live with and 2 utility bills under that person’s name.
- **Parent’s photo ID**
- **Proof of Child’s Age**
  - (One of the following documents): Child’s birth certificate (original or certified copy)
- **Immunization Records** Please provide your child’s most recent physical examination and immunizations.
- **Special Education Individualized Educational Plan (IEP) or 504 Plan,** if applicable

---

**What is the deadline to submit application?**

In order for siblings to have priority you must submit your application by **February 20th** to receive this preferred status. All other applications must be received by **March 1st**

---

**How will parents be notified?**

Parents will be notified by mail of whether or not their child was assigned or placed on a waiting list by **May 1st.**

*Please do not call the Parent Information Center or Carlton School regarding kindergarten assignments before the notification dates.*

---

**What is the age requirement for this program?**

The Carlton Innovation School will admit Kindergarten students three times during the school year. Please see the chart below for age requirement.

<table>
<thead>
<tr>
<th></th>
<th>Fall Trimester</th>
<th>Winter Trimester</th>
<th>Spring Trimester</th>
</tr>
</thead>
<tbody>
<tr>
<td>All</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Kindergarten students who are 5 years old between September 1st and November 30th</td>
<td>All</td>
<td>All</td>
<td></td>
</tr>
<tr>
<td>All Kindergarten students who are 5 years between December 1st and February 28th</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

---

**What documents do I need to submit with my application?**

Students entering Salem Public Schools are assigned according to our Controlled Choice Student Assignment Policy:

1) Programmatic placements
2) Sibling preference (if submitted by February 20th)
3) Choice and Free and reduced Lunch Status
4) Proximity

---

**When is kindergarten screening?**

Kindergarten screening will take place at the Carlton Elementary School before each trimester entry. Parents will be contacted by staff member of the Carlton School to set up appointments.

---

**What if my child has a medical condition?**

If your child has a health condition such as asthma, diabetes, allergy to food or bees, seizure disorder, cystic fibrosis, bleeding disorder or other health concern, please contact the nurse at Carlton school as soon as possible to plan for his/her care that may be necessary during the school day. Questions or concerns during the summer can be directed to Paula Dobrow, RN, at (978) 825-5500.
6/28/17

Attn: Margarita Ruiz

Salem High Men’s Alumni Lacrosse Game

7/22/17 10am-12pm

I would like to first introduce myself, my name is Bradley Duhaime and I am from the graduating Class of 2009 from Salem High School. During my time at Salem High I was lucky enough to have the opportunity to participate and be successful in multiple sports. From Salem High School, I went onto graduating from Merrimack College where I play collegiate lacrosse.

I am writing to you as I have reached out to all alumni of Salem High lacrosse and requested them to save 7/22/17 date to play in one of the first Salem High alumni lacrosse games. After the submission of the application (attached), it was then brought to my attention of a $500.00 fee. For this event the only pieces of equipment that will be requested are two lacrosse nets. I can ensure no damage or littering will be happening during this two hours event. The spectators will be minimal as all in attendance will be mostly players/alumni. Although I understand the norm of a $500 ($125.00/hour @ minimum of 4 hours) fee I would like to request to have the fee to be approved to be waived. I believe this is a great opportunity for all of the former members of the Salem High Men’s Lacrosse program to get together and have some fun. I appreciate your time and consideration and look forward to hearing from you.

Sincerely,

Bradley Duhaime

508-631-5455

Bradleyduhaime36@gmail.com
State law provides that:

The committee shall create and maintain accurate minutes of all meetings, including executive sessions, setting forth the decisions made and the actions taken at each meeting, including the record of all votes.

No vote taken at an open session shall be by secret ballot. Any vote taken at an executive session shall be recorded by roll call and entered into the minutes.

Approval of a majority of the School Committee, equal to no less than 4 affirmative votes, is required for final adoption or amending policies; approving resolutions, contracts, calendars, improvement plans and the annual budget, as well as other non-routine items before the committee.

A quorum at a meeting may constitute approval for the purpose of routine matters of the committee including approving minutes, budget transfers and general items (e.g. field trips, referral of matters to Committee, etc.) and not specifically requiring approval of a majority of the full body.

Members abstaining or declaring him or herself present understand that they are expressing their willingness to accept the will of the majority of those members actively voting.

In keeping with the law, the Salem School Committee has adopted as its policy the practice of recording every vote taken by the committee. The votes of each member shall be recorded.

Legal Reference: 30A:22
<table>
<thead>
<tr>
<th>DESCRIPTION</th>
<th>SECTION</th>
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<tbody>
<tr>
<td><strong>FISCAL MANAGEMENT &amp; NON-INSTRUCTIONAL OPERATIONS</strong></td>
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<tr>
<td>Budget</td>
<td>3100</td>
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<tr>
<td>Budget Planning</td>
<td>3101</td>
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<tr>
<td>Financial Reports and Statements</td>
<td>3102</td>
</tr>
<tr>
<td>Budget Adoption Procedures</td>
<td>3103</td>
</tr>
<tr>
<td>Fiscal Year/Budget Deadlines and Schedules</td>
<td>3104</td>
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<tr>
<td>Income</td>
<td>3200</td>
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<tr>
<td>Funding Proposals and Applications</td>
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<td>Acceptance of Gifts, Grants and Requests</td>
<td>3202</td>
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<td>Gate Receipts and Admissions</td>
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<tr>
<td>Lease and Rental of School Facilities</td>
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<tr>
<td>Disposal of School Properties</td>
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<tr>
<td>Revenues from Tax Sources</td>
<td>3206</td>
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<td>Accounts</td>
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<td>Accounting and Reporting</td>
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<td>Audits</td>
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<td>Procedures for Handling Cash Receipts</td>
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<td>Revolving Accounts</td>
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<td>Student Activities Fund Management</td>
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<td>Fixed Asset Inventory</td>
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<tr>
<td>Bonded Employees and Officers</td>
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<tr>
<td>Expenditures</td>
<td>3400</td>
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<tr>
<td>Purchasing and Purchasing Authority</td>
<td>3401</td>
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<tr>
<td>Payment Procedures</td>
<td>3402</td>
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<tr>
<td>Cooperative Purchasing</td>
<td>3403</td>
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<tr>
<td>Payday Schedules</td>
<td>3404</td>
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<tr>
<td>Depository of Funds/Authorized Signatures</td>
<td>3405</td>
</tr>
<tr>
<td>Expense Reimbursements</td>
<td>3406</td>
</tr>
<tr>
<td>Sales Calls and Demonstrations</td>
<td>3407</td>
</tr>
</tbody>
</table>
The superintendent or designee shall submit financial reports on a quarterly basis to the School Committee providing for the following information: 

- A report providing the budget balance in each appropriation account (non-salary and salary accounts) of the current school budget and any encumbrances against that budget account;

- Provide any pertinent and relevant data and financial information to the committee; such as unexpected or emergency expenses, one time large expenditures, etc.;

- A report that projects a projection of any budget account, which may exceed the appropriation.

In addition, the Superintendent and the Business Manager will submit a monthly report of transfers within budget line item transfers within the budget to the school committee for a vote. Said report shall indicate the original and new locations of the funds involved in these transfers and a written rationale for these transfers.

It is the responsibility of the superintendent and the business administrator to advise the School Committee immediately to any circumstances that might cause a budget deficit.

Approved: 7/24/06
In compliance with the law, the school system observes a fiscal year beginning July 1 and ending June 30, as must the city and all other governmental bodies in Massachusetts.

The School Committee shall hold a public hearing on its proposed budget not less than seven days after publication of a notice thereof in a newspaper having general circulation in such city, town, or district the City of Salem.

The submission of the school budget to the city will be in accordance with guidelines as established by the mayor and city ordinance.

Approved: 9/12/05
The School Committee will encourage the administration to seek and secure all possible sources of state, federal, and other special funds that will enhance the educational opportunities for the children in its public schools.

The superintendent will ensure that appropriate communication channels are established to ensure that the district is kept informed of all possible funds available to the school system under the various state and federal programs, and in what manner these funds can be used in the school system.

The superintendent, appropriate school administrators, will be responsible for seeking out and coordinating the development of proposals for all specially funded projects. The superintendent shall be the signatory on, and for all grant applications and be responsible for submitting the proposals to the School Committee for approval when required by the Massachusetts Department of Elementary and Secondary Education.

The superintendent is authorized to sign all reports for these projects and will be responsible for the proper expenditure of funds received for such projects.

Legal Reference: MGL 44:33A
FISCAL MANAGEMENT AND NON-INSTRUCTIONAL OPERATIONS 3000

INCOME 3200

GATE RECEIPTS AND ADMISSIONS 3203

Admission receipts of school events shall be adequately controlled. The principal and/or the athletic director are responsible for the administration and supervision of all public school events for which an admission is charged.

The principal and/or the athletic director shall maintain adequate records of accounting data for subsequent review and analysis.

The superintendent requires immediate-deposit of all funds within the next business day.

Approved: 9/4/24

Page 1 of 2
The superintendent will be *ultimately accountable* to the School Committee for administration of all school department funds as appropriated as well as any revolving fund accounts.

The accounting system used will conform to state requirements and good accounting practices, providing for the appropriate separation of accounts, funds, and special moneys.

The School Committee will receive periodic financial statements from the superintendent or business manager, showing the financial condition of the school department. Other financial statements as may be determined necessary by either the School Committee or the administration will be presented as found desirable.

Legal Reference:
FISCAL MANAGEMENT AND NON-INSTRUCTIONAL OPERATIONS

ACCOUNTS

AUDITS

The financial records of the City of Salem Public Schools shall be subject to an annual audit by a private accounting firm as a part of the annual city audit. The auditors shall examine the books and accounts of the School Committee and all original bills and vouchers on which money has been or may be paid from its treasury. They shall have free access to such books, accounts, bills and vouchers as often as once a month for the purpose of examination, and shall examine the same at least once in each year, and annually report in writing the result of their examinations.

The management letter and any findings shall be shared with the School Committee.

Legal Reference: MGL 41:50
FISCAL MANAGEMENT AND NON-INSTRUCTIONAL OPERATIONS

ACCOUNTS

PROCEDURES FOR HANDLING CASH RECEIPTS

When possible, receipts collected for school associated programs should be in check form. When cash is collected, it must be counted and turned over to the appropriate supervisor or building principal/administrator on the same day as collected.

Cash receipts or petty cash accumulation, which needs to be temporarily held in a school building, must be counted, recorded and placed in a locked area accessible only to the supervisor or principal/school administrator. Cash should be placed in a safe, if available. Cash will be brought to the city treasurer as soon after an event as possible.

See Administrative Guidelines

Approved: 9/12/05
FISCAL MANAGEMENT AND NON-INSTRUCTIONAL OPERATIONS

ACCOUNTS

REVOLVING ACCOUNTS

The School Committee may approve the establishment of "revolving fund accounts" so-called, in conformance with the provisions of Massachusetts General Laws Chapter 71, and as otherwise permitted by the General Laws of the Commonwealth of Massachusetts, as amended.

Any additional revolving accounts must be approved by the School Committee.

CASH IN SCHOOL BUILDINGS

All cash in any school buildings must be kept in a secure location, preferably a locked-safe, in the office of such building. It is inadvisable to allow money to remain overnight in desks, file cabinets, or closets, even if locked. Large sums should be immediately deposited for safekeeping.

Legal Reference: MGL 71:47
Warrants for payment of expenses shall be available to all School Committee members for perusal and signature on the day of School Committee meetings. The warrants will be available in the Salem School Department Business Office.

The School Committee Chair, unless voted otherwise, will be the designee of the school committee to be the signature. Signatures of four (4) members of the School Committee will be required to authorize payments. The Business Manager and Superintendent will, by signature, attest to the accuracy of said warrants before they are made available for the signatures of the designated School Committee members. The expense warrant amount(s) will be approved by the School Committee by vote and will be recorded in the minutes.

The School Department, upon approval by the School Committee, shall submit all accounts payable warrants to the City of Salem Finance Department.

The School Business Manager will be required to maintain each signed document in the Business Office of the Salem Public Schools, and provide that information when requested.

During periods of time when the School Committee does not meet regularly, the Secretary to the School Committee shall obtain the signatures of four (4) School Committee members at times and places convenient to them in order to assure the regular payment of warrants. The expense warrant amount(s) approved by the School Committee under such circumstances will be recorded in the minutes of the next scheduled School Committee meeting.

Approved: 4/4/04
4/4/04
| FISCAL MANAGEMENT AND NON-INSTRUCTIONAL OPERATIONS | 3000 |
| EXPENDITURES | 3400 |
| PAYDAY SCHEDULES | 3404 |

For pertinent information, refer to the appropriate negotiated agreement(s).
FISCAL MANAGEMENT AND NON-INSTRUCTIONAL OPERATIONS

EXPENDITURES

EXPENSE REIMBURSEMENTS

School personnel and officials who incur expenses in carrying out their authorized duties may be reimbursed upon submission of a properly filled out and approved reimbursement form and such supporting receipts as required by the City of Salem. Such expenses may be approved and incurred in line with budgetary allocations for the type of expense however reimbursement is only guaranteed with prior written authorization by the proper administrator and incurred in line with budgetary allocations for the type of expense.

When official travel by a personally owned vehicle has been authorized, payment shall be made at the rate currently approved by the School Committee City of Salem.

All travel outside of the state must have the prior written approval of the superintendent of schools.

For further information, refer to the appropriate negotiated agreement(s).

Legal Reference: MGL 40:5.

Approved: 9/4/95
With the prior approval of the superintendent, school principals may give permission to sales representatives of educational products to see members of the school staff at times that will not interfere with the educational program.
The Salem School Committee believes it to be our responsibility to make our students and staff aware of the importance of recycling materials whenever possible to conserve the world’s limited resources and conserve energy while exercising sound financial practices. To this end, all Salem Public Schools will recycle materials that would otherwise become waste, including paper, cardboard, bottles and cans, from throughout the school buildings and grounds, in support of the Massachusetts Department of Environmental Protection’s waste ban, which prohibits disposal of recyclable paper, cardboard, and paperboard; glass and metal containers; and single-resin, narrow-necked plastics. The District will look at ways to including composting if possible.

The implementation of this policy is the responsibility of the School Committee, staff, and students. Success in reducing waste through recycling is based on the cooperation of all the individuals in the school community.

To ensure success in the district’s recycling efforts, the following areas will be adopted;

1) All district personnel are expected to support recycling efforts throughout the schools.

2) A system to document recycling amounts will be created and implemented.

3) Teachers are encouraged to include educational lessons on recycling in the curriculum where appropriate.

The Salem School Committee directs the Superintendent and his/her agent to implement a materials recycling program in the Salem Schools.

Adopted this ____________________ day of ____________. 20__