

New Hampshire State Board of Education
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Thursday, September 10, 2020



AGENDA

- I. **CALL TO ORDER** – 9:00 AM
- II. **PLEDGE OF ALLEGIANCE**
- III. **PUBLIC COMMENT** ~ Please submit written commentary to Angela.Adams@doe.nh.gov to be published with the monthly meeting materials.
- IV. **PRESENTATIONS/REPORTS/UPDATES**
 - A. **Student/Deerfield School Board ~ SB-FY-20-05-005** (*Manifest Educational Hardship*)
 - B. **Student/Nashua School Board ~ SB-FY-21-07-000** (*Manifest Educational Hardship*)
 - C. **Summary of Withdrawn Cases ~ STEPHEN BERWICK**, NHDOE, Coordinator, *Dispute Resolution & Constituent Complaints*
 - D. **English Language Proficiency Standards and Assessment ~ MELISSA WHITE**, NHDOE, Administrator for Academics & Assessment and **WENDY PERRON**, NHDOE, EL Education Consultant
- V. **PUBLIC HEARINGS** ~ Please contact Amanda Phelps at Amanda.Phelps@doe.nh.gov or by calling (603) 931-9133 for testimony options.
 - A. **10:00-10:30 AM ~ Remote Instruction (Ed 306.14 & Ed 306.18(a)(7))**
- VI. **NONPUBLIC SCHOOL APPROVAL** ~ SHIREEN MESKOOB, NHDOE, Division of Education Analytics & Resources
 - A. **Commissioner's Nonpublic School Approval Designation Report**
- VII. **CHARTER SCHOOL REPORTS/UPDATES** ~ JANE WATERHOUSE, NHDOE, Charter School Administrator
 - A. **Virtual Learning Academy Charter School (VLACS) Charter Amendment Request ~ STEVE KOSSAKOSKI**, CEO
 - B. **Spark Academy of Advanced Technologies First Year Program Audit ~ DENIS MAILLOUX**, Director
- VIII. **PROFESSIONAL STANDARDS BOARD** ~ STEVE APPLEBY, NHDOE, Director, Division of Educator Support and Higher Education
 - A. **New Applications for 2020-2021**
 1. **Christina White**, Director, Northern New England Young Inventors' Program ~ Layperson Member

2. Christopher Benedetti, Associate Professor of Educational Leadership, Plymouth State University ~ *Higher Education and Education Administration Member*

IX. **LEGISLATIVE UPDATES** ~ AMANDA PHELPS, NHDOE, Administrative Rules Coordinator

A. Final Proposal ~ Vocational Rehabilitation Programs (Ed 1000)

B. Adopt ~ New Hampshire Educator Licensing (Ed 501-504, Ed 505, Ed 506 & Ed 508, Ed 509 & Ed 512-513 & Ed 507.40 & Ed 507.41)

1. Credential Standards for Educational Personnel (Ed 501-Ed 504)
2. How to Obtain a New Hampshire Educator License (Ed 505)
3. Requirements for Specific Educator Endorsements (Ed 506 & Ed 508)
4. Renewal and Denial of Credentials (Ed 509 & Ed 512-Ed 513)
5. Special Education Teachers (Ed 507.40 & Ed 507.41)

X. **COMMISSIONER'S UPDATE**

XI. **OPEN BOARD DISCUSSIONS**

XII. **OLD BUSINESS**

XIII. **TABLED ITEMS**

A. Capital City Public Charter School Status Change Request and Progress Report

XIV. **CONSENT AGENDA**

A. Meeting Minutes of August 13, 2020

B. Hollis-Brookline Cooperative School District Certification of New Apportionment Formula

XV. **NONPUBLIC SESSION**

XVI. **ADJOURNMENT** – 2:00 PM

EXECUTIVE SUMMARY OF WITHDRAWN CASES

1. Educator/NHDOE – SB-FY-20-04-004

Issue: Revocation of Credential

Outcome: Withdrawal of appeal to State Board

Action Needed by State Board: None

2. Student/Merrimack Valley – SB-FY-17-03-003

Issue: Manifest Educational Hardship

Outcome: Settlement

Action Needed by State Board: None

3. Educator/NHDOE – SB-FY-20-06-007

Issue: Revocation of Credential

Outcome: Withdrawal of appeal to State Board

Action Needed by State Board: None



EXECUTIVE SUMMARY

A. ACTION NEEDED:

A vote is needed by the State Board of Education to adopt English Language Proficiency (ELP) standards and an annual assessment of ELP for all English learners (ELs).

B. RATIONALE FOR ACTION:

With the reauthorization of the Elementary and Secondary Education Act of 1965 (ESEA), as amended by the Every Student Succeeds Act (ESSA), the Federal law requires every state to adopt English language proficiency standards and an annual assessment of ELP aligned to those standards in ESEA Section 1111(b)(1)(F):

Each State plan shall demonstrate that the State has adopted English language proficiency standards that—

- (i) are derived from the 4 recognized domains of speaking, listening, reading, and writing;
- (ii) address the different proficiency levels of English learners;
- (iii) are aligned with the challenging State academic standards.

PROHIBITIONS.—

- (i) **STANDARDS REVIEW OR APPROVAL.**—A State shall not be required to submit any standards developed under this subsection to the Secretary for review or approval.
- (ii) **(FEDERAL CONTROL.**—The Secretary shall not have the authority to mandate, direct, control, coerce, or exercise any direction or supervision over any of the challenging State academic standards adopted or implemented by a State.
- (iii) **EXISTING STANDARDS.**—Nothing in this part shall prohibit a State from revising, consistent with this section, any standards adopted under this part before or after the date of enactment of the Every Student Succeeds Act.

Section 1111(b)(2)(G) requires that a State ensure that each school district in the State provide for an annual assessment of ELP for all English learners:

(G) ASSESSMENTS OF ENGLISH LANGUAGE PROFICIENCY.—

(i) IN GENERAL.—Each State plan shall demonstrate that local educational agencies in the State will provide for an annual assessment of English proficiency of all English learners in the schools served by the State educational agency.

(ii) ALIGNMENT.—The assessments described in clause (i) shall be aligned with the State’s English language proficiency standards described in paragraph (1)(F).

These requirements were first established in 2002 with the previous version of the law, the No Child Left Behind (NCLB) Act, and were reauthorized in 2015 under the Every Student Succeeds (ESSA) Act.

To meet the requirements under the 2002 reauthorization, the New Hampshire State Board of Education voted to adopt the WIDA ELP standards and assessment (ACCESS test) in 2004. By adopting the WIDA standards and assessment, NH became a member of the WIDA multi-state consortium. Consortium membership also includes technical assistance, access to a suite of professional learning opportunities for NH educators, and access to a support network of 39 other state agencies across the country.

When updates and changes are made to the state adopted ELP standards and assessments, the US Department of Education requires State Educational Agencies to obtain approval from the State Board of Education. In 2019, the US Department of Education, conducted a Peer Review of New Hampshire’s assessment systems, including ELP assessments. The peer review revealed that the State Board of Education has not reviewed the state’s adopted ELP standards and assessments since its initial adoption in 2004. The US DOE review triggered this request.

Since NH’s initial adoption of the WIDA standards and assessments in 2004, the following changes have occurred to reflect evolving theoretical insights:

In 2007: WIDA ELP standards were expanded to organize academic language goals around specific content areas.

In 2012: The WIDA standards were amplified and renamed “2012 Amplification of English language development (ELD) standards.” The revised components included: connections to Common Core State Standards (CCSS) & Next Generation Science Standards (NGSS); examples for contextualized language use; and the addition of cognitive functions of language to encourage complex thinking in English learners.

In 2016: The WIDA ELP annual assessment (ACCESS) migrated from paper-and-pencil to an online assessment.

In 2017: The ACCESS test was updated after WIDA conducted standards setting to reexamine proficiency level scores. The following factors motivated these studies: migration from a paper-and-pencil to the online assessment; employment of a new

centrally scored, revised speaking assessment; and adapting to the influence of college and career readiness standards.

In 2020: Release of updated 2020 WIDA ELD standards to include additional resources for educators. For example, greater specificity of performance indicators within grade-level clusters; new goals for language-driven content learning; and key language uses redefined as high-leverage genre families to help educators organize and coordinate instruction.

Note on terminology: Two common terms for these standards are *English language proficiency (ELP) standards* and *English language development (ELD) standards*. They are used interchangeably in this document, but reflect an evolution in understanding relevant to second language development.

The proposed adoption of the 2020 WIDA standards was discussed and input from key stakeholders and the public was collected on a number of occasions.

On May 7, 2020 at the Statewide EL Educators Community of Practice meeting with over 100 EL educators from around the state present

On July 29, 2020 at the State EL Advisory Committee meeting

During a public comment session open from August 25, 2020 – September 8, 2020. Notice of the public comment session was posted on the DOE website; emailed directly to the statewide list of 465 EL educators as well as the list of state superintendents; and also posted on the independent professional network listserv for EL educators (NHESLNET).

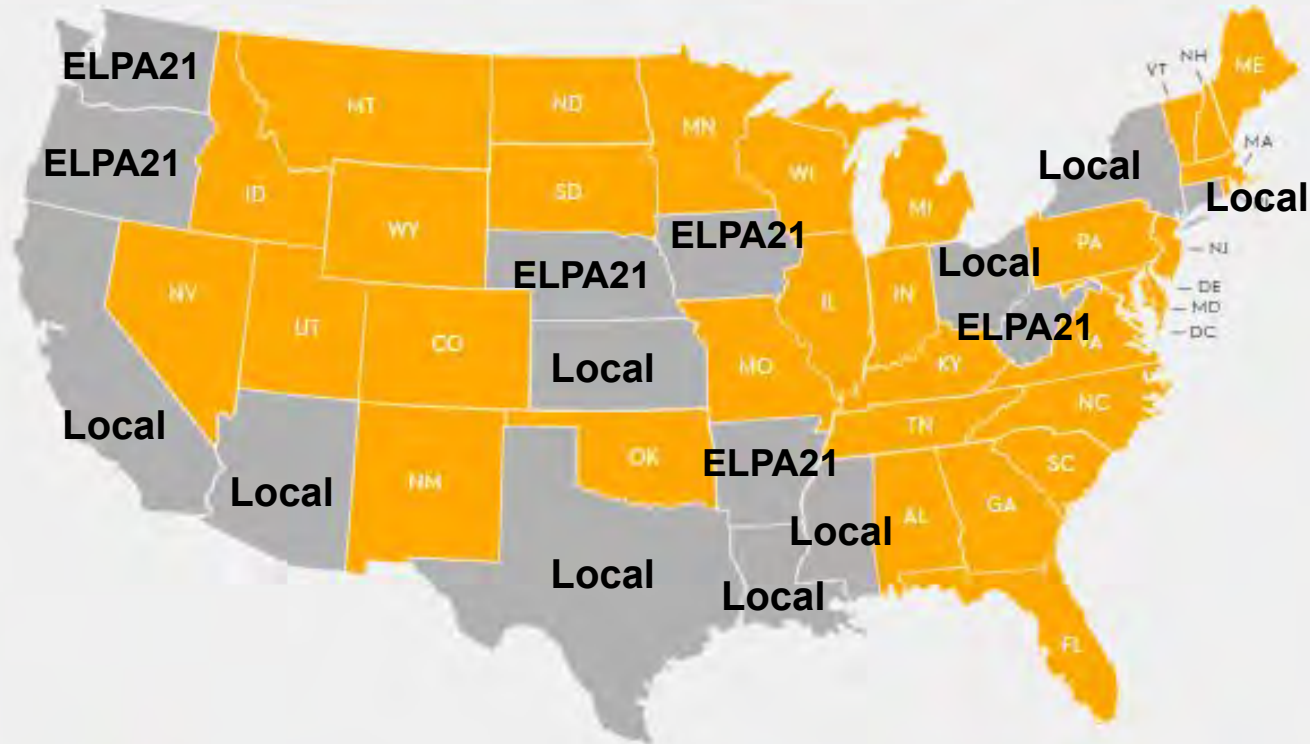
C. EFFECTS OF THIS ACTION:

By approving this action today, the Department of Education can begin to offer training to the State's ESOL educators on the revised 2020 standards and launch implementation of the standards during the 2020-21 school year. In addition, the Department will remain compliant with federal laws and will file an update required by the Peer Review process with the US Department of Education in December.

D. POSSIBLE MOTION:

I move, with the recommendation of the Statewide EL Advisory Committee, the Statewide EL Educator's network and the input from the public, that the State Board of Education adopt the WIDA 2020 ELP standards and the aligned assessments: (1) ACCESS 2.0 (annual ELP assessment); (2) K-12 Online screener (initial assessment); and the Alternate ACCESS (for ELs with the most significant cognitive disabilities).

National ELP Standards and Assessment Trends



 **WIDA
Consortium**



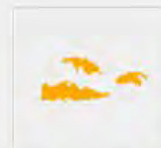
Alaska



Hawaii



Northern Mariana
Islands



U.S. Virgin Islands

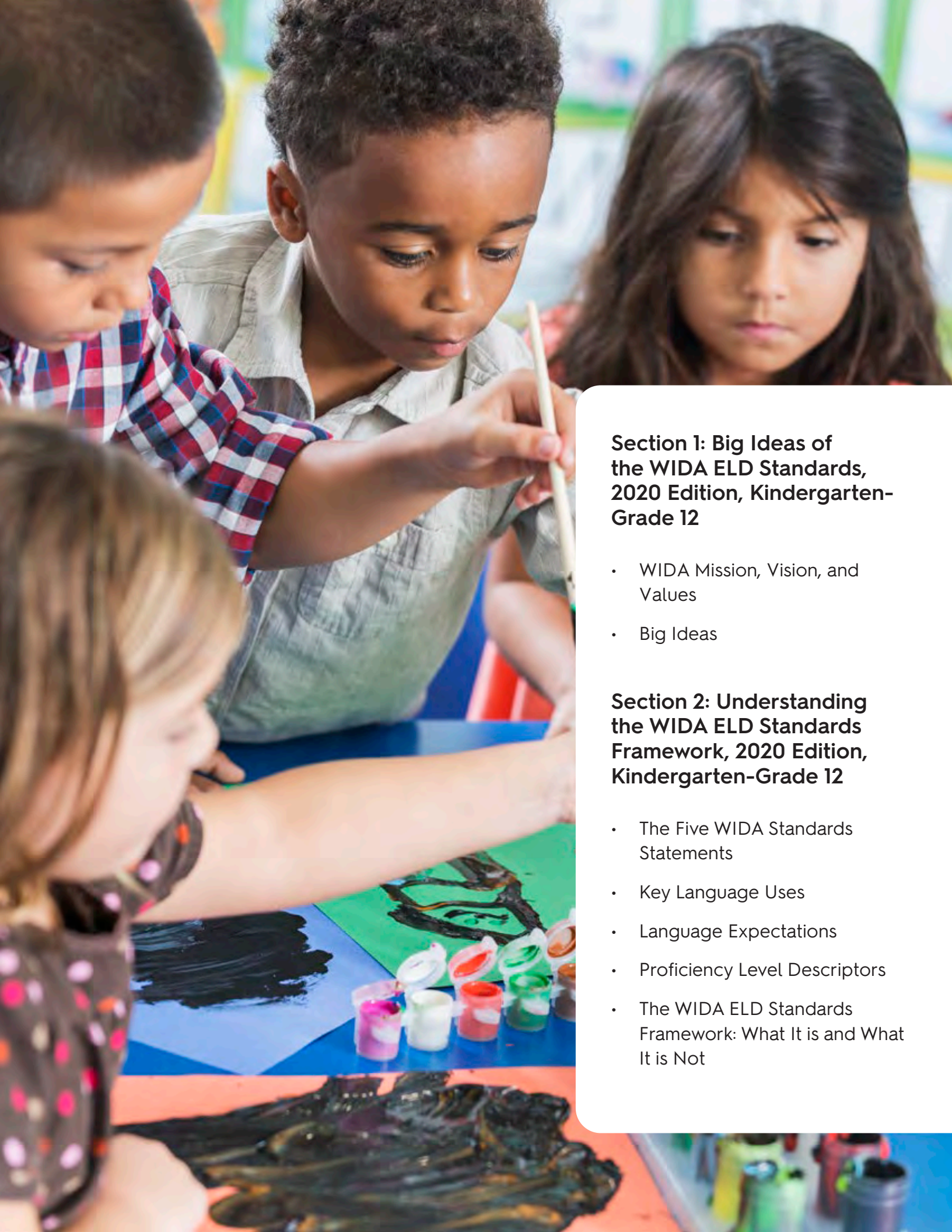


WIDA English Language Development Standards

Kindergarten – Grade 12

Promote equity for multilingual learners • Teach language and content together

2020
EDITION



Section 1: Big Ideas of the WIDA ELD Standards, 2020 Edition, Kindergarten-Grade 12

- WIDA Mission, Vision, and Values
- Big Ideas

Section 2: Understanding the WIDA ELD Standards Framework, 2020 Edition, Kindergarten-Grade 12

- The Five WIDA Standards Statements
- Key Language Uses
- Language Expectations
- Proficiency Level Descriptors
- The WIDA ELD Standards Framework: What It is and What It is Not

WIDA English Language Development Framework, 2020 Edition

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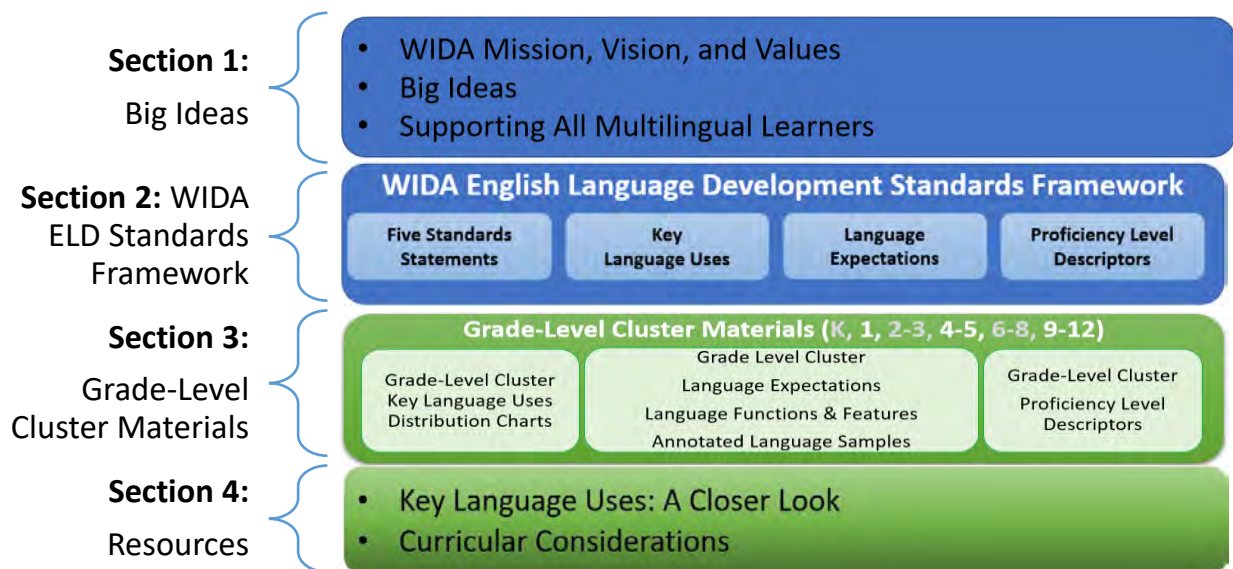
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Orientation to Document

Organization of the Document

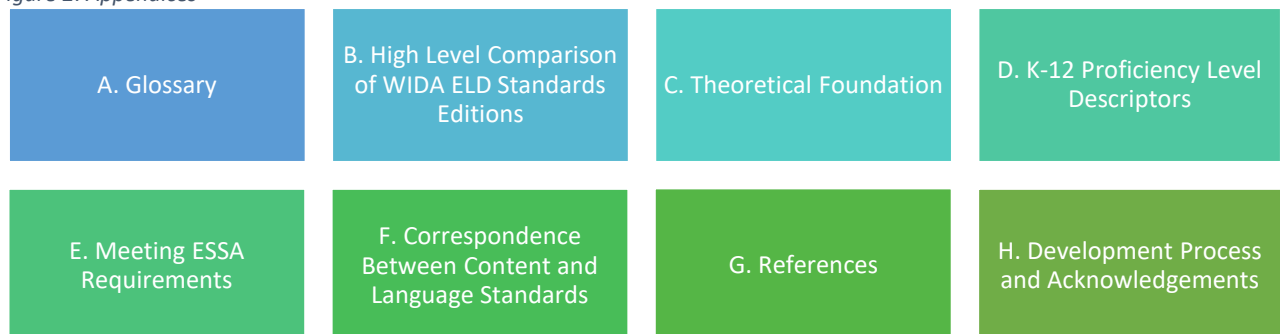
The 2020 Edition of the WIDA ELD Standards Framework is organized in four main sections:

Figure 1: Overall Organization of the Document



Eight appendices accompany this document.

Figure 2: Appendices



The table below provides brief descriptions of what you will find in each section of this document.

Figure 3: Brief description of each document section

Section 1: Big Ideas	<ul style="list-style-type: none"> • Big Ideas build on WIDA's mission, vision, and values and anchor the standards framework: • Equity of access and opportunity to ensure the success of all multilingual learners for college, career, and civic participation • Integration of language and content in the planning and delivery of instruction • Collaboration among stakeholders in shared responsibility for multilingual learners • A functional approach to language development focusing on the purposeful use of language
Section 2: WIDA ELD Standards Framework	<ul style="list-style-type: none"> • The WIDA ELD Standards Framework consists of four interactive components: • The Five WIDA ELD Standards Statements provide the broadest conceptual framing of language and content integration • Key Language Uses summarize language uses across disciplines, helping educators organize and prioritize instruction • Language Expectations are goals for content-driven language learning • Proficiency Level Descriptors describe the language multilingual learners can process and produce as they near the end of each proficiency level
Section 3: Grade- Level Cluster Materials	<ul style="list-style-type: none"> • Grade-Level Cluster Materials add specificity and supporting details to the Standards Framework: • Language Functions and Features are building blocks of language that help craft each Language Expectation • Annotated Language Samples illustrate Language Expectations, Functions, and Features in the context of a grade-level text • Proficiency Level Descriptors describe language development trajectories of multilingual learners
Section 4: Resources	<ul style="list-style-type: none"> • Key Language Uses: A Closer Look provides extended definitions and examples for each Key Language Use, including common features and unique aspects across grade-level clusters and disciplines • Curricular Resources offer a sample unit design process and a sample unit of learning to help audiences begin to envision how they might use the WIDA ELD Standards Framework in curriculum design

Terminology: from English Language Learners to Multilingual Learners

Throughout the field of K-12 education, various terms are used to describe multilingual learners. Commonly used terms include “English language learners” (ELLs), “emergent bilinguals,” and “dual language learners” (DLLs), the latter also referring to children ages birth to five. ESSA (2015) uses the term “English Learners” (ELs).

For policy purposes, the five original WIDA standards statements maintain the term “English Language Learners” (see page 12). Yet, encouraging the field to use terminology that is asset-based and inclusive, WIDA has introduced the term “multilingual learners” that is used throughout the document.

Multilingual learners, as defined by WIDA, is an overarching term for the vast numbers of students who come in contact with and/or interact in languages in addition to English on a regular basis. The term includes students who are commonly referred to as newcomers, Students with Interrupted Formal Schooling (SIFE), Long Term English Learners (LTELs), English Learners with Disabilities, Gifted and Talented English Learners, Heritage Language Learners, and students who speak varieties of English or indigenous languages.

Multilingual learners refers to all children and youth who are, or have been, consistently exposed to multiple languages. It includes students known known as English language learners (ELLs) or dual language learners (DLLs); heritage language learners; and students who speak varieties of English or indigenous languages.



Photo

Audiences and Uses of the WIDA ELD Standards, 2020 Edition

The WIDA ELD Standards, 2020 Edition, is a consortium-wide K-12 guide for national and international audiences. In response to WIDA's many stakeholder groups, the following figure outlines an array of uses for the document. While there is some overlap, emphasis has been placed on the distinct nature and responsibilities of each group and its contribution to the education of multilingual learners.

Figure 4: Audiences and Uses of the WIDA ELD Standards, 2020 Edition

Audience	Uses of the WIDA ELD Standards, 2020 Edition
State Education Agencies (SEAs)	<ul style="list-style-type: none"> • Comply with federal mandates, including Peer Review requirements • Assure alignment with ACCESS, the English language proficiency assessment • Guide state policy and informational documents referenced to standards • Inform state standards resources inclusive of equity for multilingual learners • Organize professional learning opportunities for educators of multilingual learners
Local Education Agencies (LEAs)	<ul style="list-style-type: none"> • Guide professional learning to infuse language and culture into extant curriculum design • Spark collaboration between leadership and educators of multilingual learners • Work with teachers and other school leaders to provide guidance on language development • Prompt coordination of services for multilingual learners and outreach to families • Share ideas with teachers and families to advance teaching and learning of multilingual learners
School Leaders	<ul style="list-style-type: none"> • Promote partnerships between language and content teachers with dedicated planning time • Forge partnerships with multilingual communities • Support teachers in enacting linguistically and culturally sustainable curriculum • Stimulate discussion and consensus-building among staff re: standards-based education of multilingual learners
Teachers	<ul style="list-style-type: none"> • Partner to coordinate learning for multilingual learners • Collaborate with colleagues around curriculum design and integration of content and language instruction • Provide standards-referenced feedback to students and families • Model end-of-unit products, projects, and performances to illustrate evidence of meeting learning expectations • Share standards materials for monitoring multilingual learners' language growth
Teacher Educators and Professional Learning Providers	<ul style="list-style-type: none"> • Use as a resource for courses for pre-service teachers, in-service teachers, and administrators • Guide professional learning around assets-driven education for districts and schools • Partner in conducting classroom, school, and district research • Model the process for integrating language and content in instruction and assessment
Test Developers and Assessment Leaders	<ul style="list-style-type: none"> • Use as a source for large-scale annual and interim ELP assessment development • Use as a source for alignment and standards-setting studies • Guide in interpreting score reports and in updating interpretive and scoring rubrics • Expand framing of test specifications around Key Language Uses and Language Expectations
International Schools and Educators	<ul style="list-style-type: none"> • Embed language into curriculum, instruction, and classroom assessment • Craft a school-wide language policy • Collaborate with colleagues to coordinate language services • Share with grade-level teams to create seamless learning experiences for multilingual learners
Students, Families, and Communities	<ul style="list-style-type: none"> • Benefit from clear learning goals that promote equity for all • Benefit from a coherent educational experience based on a standards-aligned system • Benefit from having clarity on what teachers should be teaching and what students should be learning • Understand the language development process and how the ELD standards represent the joining of grade-level content and language

Section 1: Big Ideas of the WIDA ELD Standards, 2020 Edition: Grades Kindergarten–12

WIDA Mission, Vision, and Values

WIDA draws its strength from its [mission, vision, and values](#). These beliefs act as a unifying force that gives the consortium its strength of conviction and action throughout the PreK-12 education community.

Mission

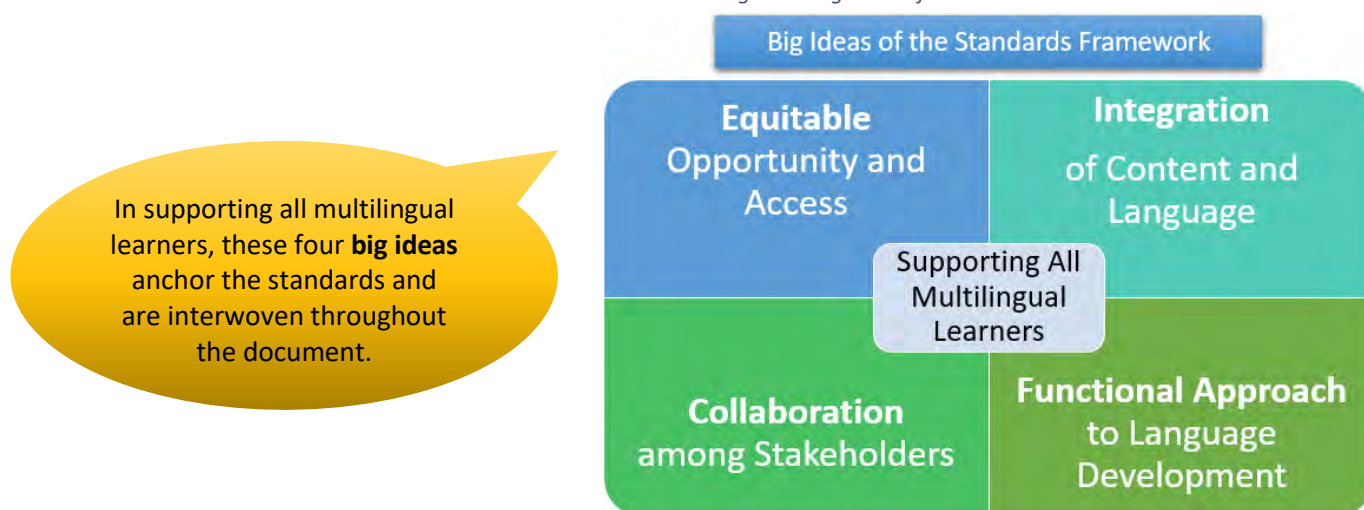
WIDA advances academic language development and academic achievement for children and youth who are culturally and linguistically diverse through high quality standards, assessments, research, and professional learning for educators.

Since its inception in 2003, WIDA has been steadfast and committed to its [Can Do Philosophy](#), an underlying belief in the cultural, social, emotional, and experiential assets and resources of multilingual learners, families, and educators. The Can Do Philosophy serves as an inspiration for all of WIDA's thinking. The updated WIDA [Guiding Principles of Language Development](#) (2019) underscore the importance of language in learning. Together, the ELD Standards, the Can-Do Philosophy, and the Guiding Principles provide the foundation for all that WIDA does.

Photo

Big Ideas of the WIDA ELD Standards Framework, 2020 Edition

Figure 5: Big Ideas of the ELD Standards Framework



Supporting all Multilingual Learners

The four big ideas of the WIDA Standards Framework converge around supporting the success of multilingual learners in school. Multilingual learners represent a wide range of cultural, linguistic, educational, and socioeconomic backgrounds and have many physical, social, emotional, and/or cognitive differences. All bring assets, potential, and resources to school. Teaching is a complex and dynamic act, and increasing avenues of access, equity, agency, and success for all multilingual learners requires educators to be knowledgeable, skillful, imaginative, and compassionate to help all students reach their potential. The big ideas in this document support the design of standards-based educational experiences that are student-centered, culturally and linguistically sustaining, and responsive to multilingual learners' strengths and needs. For more on Supporting All Multilingual Learners, see Section 4: Resources (under development).

Equitable Opportunity and Access

WIDA is rooted in **equity** for multilingual learners, their families, and educators. Multilingual learners' exposure to and knowledge of multiple languages and cultures are advantages that help them build metalinguistic (understanding how languages work), metacultural (understanding the interplay among cultures), and metacognitive (understanding ways of thinking) awareness.

Drawing on students' linguistic and cultural resources is essential to helping them navigate life in a diverse world, but also, as they advance through school, to respond to the demands of disciplinary learning in the academic content areas.

Integration of Content and Language

The WIDA ELD standards have always represented **language and content together**. The 2020 Edition makes the language-content connection more specific and explicit. It foregrounds the ways disciplinary language is used in academic content standards, concepts, and practices. The integration of content and language in well-designed classrooms for multilingual learners maximizes their opportunities to

- interact with each other in challenging activities
- deeply engage in learning
- understand the connections between language and content
- make meaning in disciplinary contexts
- reach the high expectations of rigorous content

Disciplinary language includes **multimodal** means of communication in specific content areas and expression in multiple languages.

***Multimodality** is an essential way for all students to make meaning and engage in disciplinary practices. In addition to the use of spoken and written words, students also communicate through gestures, facial expressions, images, equations, maps, symbols, diagrams, charts, videos, graphs, computer-mediated, and other means.*

Collaboration among Stakeholders

Districts and schools are complex educational systems. Stakeholders have different areas of expertise and are often responsible for different aspects of educational planning and delivery; however, they are collectively responsible for the success of multilingual learners.

***Collaboration among stakeholders** (e.g. district and school leaders, content and language teachers, specialists, support personnel, students, families) is a prerequisite to providing multilingual learners with a high-quality educational experience that is coordinated and comprehensive.*



In particular, as **content and language teachers work together** to plan and deliver standards-based instruction, they support one another, share unique fields of expertise, and take collective responsibility ensuring the success of multilingual learners. In this way, multilingual learners benefit from a coherent and shared understanding of expectations and common goals for learning.

Functional Approach to Language Development

Historically, the WIDA Standards Framework has presented **language** as a dynamic meaning-making resource that is realized through three dimensions: discourse, sentence, and word/phrase (for more on the three dimensions of language, see the Features of Academic Language on page 21).

WIDA’s functional approach to language development has consistently highlighted effective communication, focusing on how language is used for particular purposes, with particular audiences, and in particular **sociocultural contexts**.

*WIDA defines **sociocultural context** as the association of language with the culture and society in which it is used. In reference to schooling, sociocultural context refers to the interaction between students and the classroom environment, and the influences that shape that classroom environment (e.g., purpose, topic, situation, participant’s identities and social roles, audience).*

Understanding that language a) varies according to context and b) serves a social purpose – can help educators focus on functional language use. With success in school as the ultimate goal, the Standards Framework presents language as a dynamic set of tools for multilingual learners to make meaning in the ways of the discipline, its concepts, and practices.

As language is used in various contexts, for various purposes, and for different audiences, it necessitates different levels of technicality, formality, authority, density, coherence, and the like – in essence, language is more than a collection of isolated grammatical forms.

To illustrate WIDA’s functional approach to language development, students make choices with language when they

- Adjust communication and delivery appropriate to discipline-specific tasks
- Use additional linguistic and cultural resources to delve into deep learning
- Attend to social norms and roles in communicating to build co-membership in school
- Exchange ideas, information, and feelings in the students’ preferred language(s)
- Translanguage (Translanguaging refers to the dynamic and natural interaction between languages, where students use multiple languages to communicate, often simultaneously.)

Teachers can foster students’ abilities to make choices with language when they

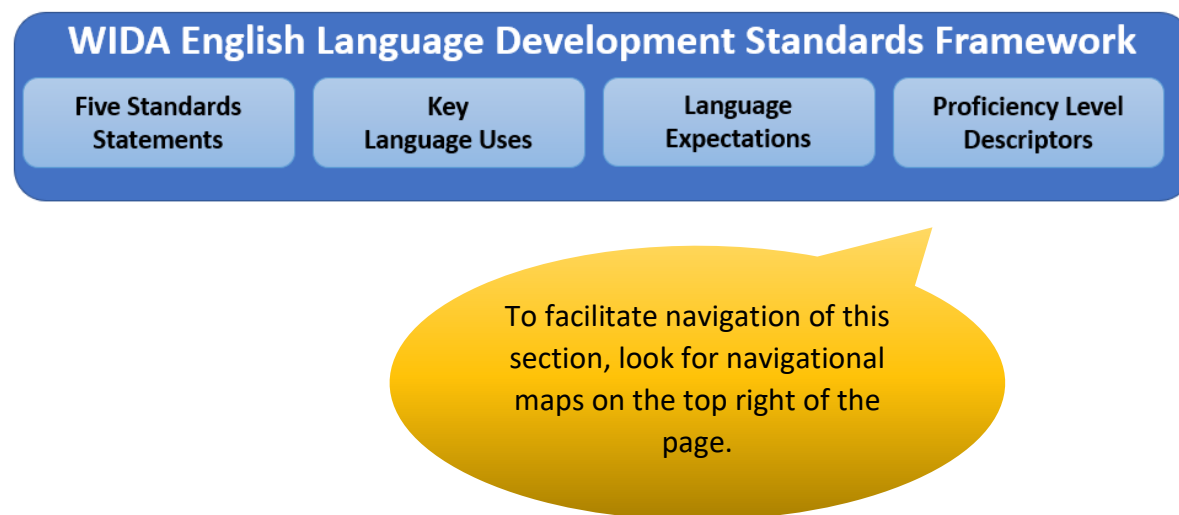
- Scaffold grade-level learning and language development for effective communication according to disciplinary literacies and practices
- Continuously deepen knowledge and sensitivity to the social, cultural, and linguistic backgrounds of multilingual learners
- Recognize and make explicit the cultural nuances of linguistic cues and register, such as volume, tone, and intonation
- Support multilingual learners’ individual identities and variation in expression
- Validate and support the use of multiple languages for thinking and acting with others



- For more on WIDA’s functional approach to language development and sociocultural context of learning, see Appendix C: Theoretical Foundation.
- See also WIDA’s [Guiding Principles of Language Development](#)

Section 2: Understanding the WIDA ELD Standards Framework, 2020 Edition Kindergarten–Grade 12

Figure 6: The Components of the WIDA ELD Standards Framework



The WIDA ELD Standards Framework, in partnership with cross-disciplinary academic content standards, define the language multilingual learners need for engaging in learning and preparing for college, career, and civic readiness.

The WIDA ELD Standards Framework consists of four interactive components.

- **The five WIDA standards statements** provide the broadest conceptual framing of language and content integration
- **Key Language Uses** summarize the most prominent language uses across disciplines, helping educators organize and prioritize curriculum and instruction
- **Language Expectations** add specificity to the five standards statements to provide goals for content-driven language learning
- **Proficiency Level Descriptors** describe the interpretive and expressive language multilingual learners can use as they near the end of each language proficiency level

Each component is explored more in depth in the following pages.

The Five WIDA Standards Statements

In the past decade K-12 education has undergone major changes. To remain current with policy, theory, and practice, representations of the WIDA ELD Standards Framework have evolved; however, since 2004, WIDA has maintained its original five standards statements.

The five standards statements – the first component of the WIDA ELD Standards Framework for the 2020 Edition – provide the broadest conceptual framing of language and content integration. They represent social, instructional, and academic language for students to engage with peers, educators, and the curriculum in schools.

Figure 7: The Five English Language Development Standards Statements

ELD Standard	ELD Standard Statement	Abbreviation
English Language Development Standard 1	English language learners communicate for Social and Instructional purposes within the school setting	Language for Social and Instructional Purposes
English Language Development Standard 2	English language learners communicate information, ideas, and concepts necessary for academic success in the content area of Language Arts	Language for Language Arts
English Language Development Standard 3	English language learners communicate information, ideas, and concepts necessary for academic success in the content area of Mathematics	Language for Mathematics
English Language Development Standard 4	English language learners communicate information, ideas, and concepts necessary for academic success in the content area of Science	Language for Science
English Language Development Standard 5	English language learners communicate information, ideas, and concepts necessary for academic success in the content area of Social Studies	Language for Social Studies

The 2020 Edition builds on the foundation of the five standards statements. Drawing on research, literature, and international models, it has carefully considered various sources, including state departments of education, scholars, assessment developers, professional organizations, and educators from kindergarten through college. Using the five Standards Statements as its backbone, the 2020 Edition is the culmination of an extended, broad-based effort to ensure that all multilingual learners have equitable access and opportunity for success in school and beyond.

The abbreviations for the ELD standards statements (“the language **for** ...”) in Figure 7 exemplify WIDA’s functional approach to language development. The abbreviations point to

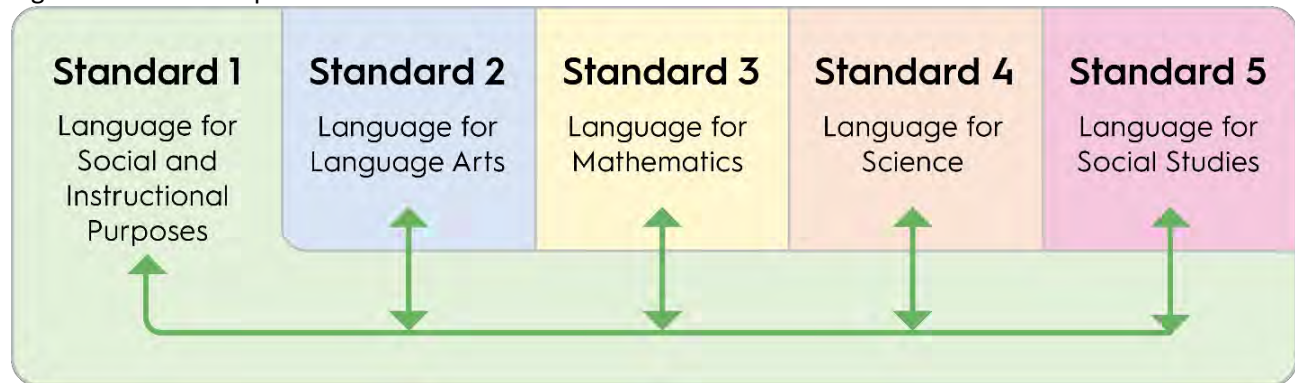
- the dynamic nature of language
- communicative purposes of the discipline or content area
- the use of language as a set of tools to communicate and make meaning
- language use in the service of learning – in other words, language **for** thinking and doing

The Positioning of Standard 1: Language for Social and Instructional Purposes

ELD Standard 1 represents language that is integral to the social and instructional experiences of multilingual learners in school as they interact with others, build relationships, offer and gain multiple perspectives, problem-solve, and investigate a range of topics and issues. Standard 1 takes multilingual learners' linguistic and cultural resources into account as the bases for their engagement in deep learning.

Language for Social and Instructional Purposes is connected to the language of WIDA's other four standards and applies across a range of educational contexts and language proficiency levels

Figure 8: Relationship of WIDA ELD Standard 1 to ELD Standards 2-5

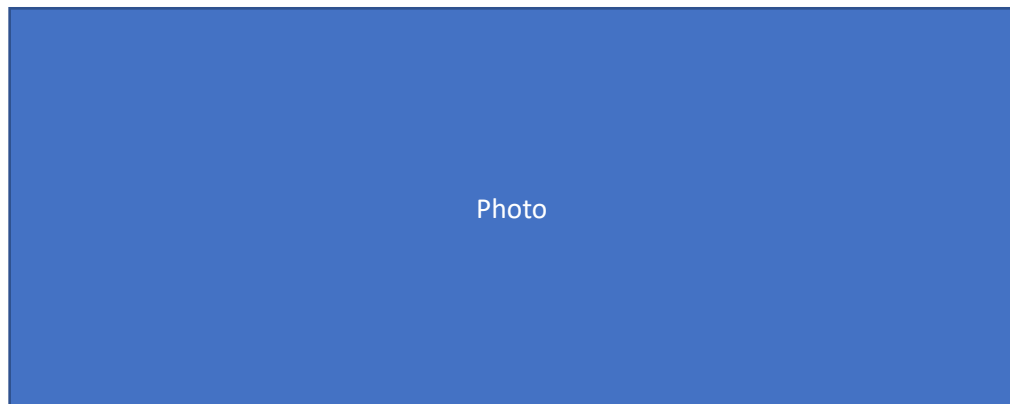


Students communicate to learn, but also to convey personal needs and wants, to affirm their own identities, and to form and maintain relationships. Rooted in sociocultural theory, developmental science, and the science of learning, ELD Standard 1 emphasizes the importance of multilingual learners' access to equitable learning throughout the school day, with appropriate scaffolds as needed.

ELD Standard 1 encompasses multilingual learners' use of language:

- **As they expand their linguistic repertoire from Level 1-Entering through Level 6-Bridging and progress through every grade level.** Standard 1 is not just for newcomers and young children, and it is not a precursor to learning disciplinary language. Rather, it encompasses opportunities for multilingual learners to develop language for social and instructional purposes at all language proficiency levels, all grade levels, and in all content areas.
- **Across all disciplines and school settings.** Language for social and instructional purposes is foundational for engagement and learning content in every discipline – from core disciplines like language arts and mathematics to visual and performing arts; health and physical education; cross-disciplinary endeavors like use of technology, library/media center time; and school-wide activities and events. Language is a part of the entire school day and all educators share responsibility for engaging multilingual learners in rich opportunities to simultaneously learn content and language.

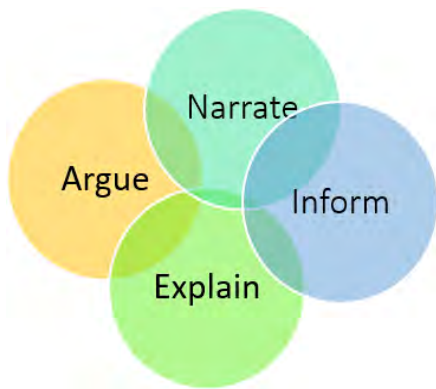
- **Across numerous topics, tasks and situations.** ELD Standard 1 presents Language Expectations that apply to a range of activities and interactions. Some examples include setting classroom norms, establishing routines, following procedures, asking for clarification, discussing with peers, relating personal ideas and perspectives, and exploring languages, cultures, and perspectives. See the ELD Standard 1 section of each grade-level cluster for more contexts where students use language for instructional purposes.
- **In interacting with others.** Language is, after all, a social practice that is dependent on an awareness of one's own and others' identities, the unique roles and objectives that participants have in communicating, and ways of making meaning with different members of a learning community, including peers, teachers, administrators, counselors, paraprofessionals, interpreters, family and community liaisons, other support staff, and visitors to the school.
- **Within learning initiatives focused on cultivating students' identities as learners and/or awareness of self and others.** Many multilingual learners are doing extra work to expand their language repertoire as they learn new academic content. They are also learning about the culture of school and how it is similar to or distinct from their past experiences and life outside of school. ELD Standard 1 promotes WIDA's [Can Do Philosophy](#), encouraging everyone to acknowledge multilingual learners' culture and identities as assets, and supporting their ability to use language to advocate for their own needs while feeling assured of their social-emotional well-being.



Key Language Uses

The second component of the WIDA ELD Standards Framework are Key Language Uses.¹ Key Language Uses emerged from a systematic analysis of academic content standards and research literature. Whereas the analysis showed that many *genre families* are used in school, in order to prioritize and organize a representation of language in the academic content standards, WIDA selected **the most high-leverage** ones as **Key Language Uses**.

Figure 9: The Four Key Language Uses



Key Language Uses exemplify the Big Idea: Functional Approach to Language Development (see page 10). Key Language Uses highlight language use for particular purposes, with particular audiences, and in particular sociocultural contexts. They

- Bring focus and coherence to the language of schooling
- Represent prominent language use across content standards
- Help educators make choices to prioritize and organize content and language integration
- Serve as an organizing principle for the Language Expectations

WIDA recognizes that Key Language Uses are one of many different configurations for connecting language to content through standards. The increased emphasis on genre-centered pedagogy (teaching that highlights genres as a way of organizing communication) provides a natural point for collaboration between content and language educators, with Key Language Uses serving as a focal point for that partnership.

Key Language Uses (*Narrate, Inform, Explain, Argue*) are select **genre families** that appear across content areas.

Genre Families are major categories of **genres** (e.g. *explanation*) with many “members” (e.g., *causal explanation, cyclical explanation, factorial explanation*).

Genres, or the “members” of the Key Language Use families (e.g., *causal explanation, cyclical explanation, factorial explanation*), are multimodal types of texts (oral, written, visual) that recur frequently for specific purposes, with specific discourse organization and language features.

¹ WIDA introduced Key Language Uses in 2014 with the K-12 Can Do Descriptors, Key Uses Edition. In the 2020 Edition of the WIDA ELD Standards Framework, Recount has been divided into Narrate and Inform, and Discuss has been embedded throughout the document (as for example in interactive learning).

Note that Key Language Uses share some common aspects across disciplines, and yet each discipline also has unique ways of applying Key Language Uses. Key Language Uses afford multilingual learners ample opportunities to interact and discuss with their peers.

Below are brief definitions for each Key Language Use.

NAR

Narrate highlights language to convey real or imaginary experiences through storytelling. Narratives serve many purposes, including to instruct, entertain, teach, or support persuasion. As students narrate, they orient audiences to time and place. Narratives may include visual details, depict actions, manipulate pace, and use dialogue.

INF

Inform highlights language to provide generalized information and facts. As students convey information in nonfiction contexts, they define, describe, compare, contrast, organize, categorize, or classify concepts, ideas, or phenomena.

EXP

Explain highlights language to give account for *how* things work or *why* things happen. As students explain, they substantiate the inner workings of natural, man-made, and social phenomena, often searching for causal relationships and overarching theories to construct understandings.

ARG

Argue highlights language to develop claims, counterclaims, and the selection of convincing evidence to support them. As students argue, they clarify, challenge, generalize, and justify conclusions and reasoning. Argue can be used to change the audience's point of view, to bring about action, and to accept a position or evaluation of an issue.

*As genre families, Key Language Uses can overlap, blend, and build on each other. They are not strict categorical divisions. For example, as students develop complex explanations, they may **Inform** (by naming, defining, describing, or comparing and contrasting something), and even **Narrate** (e.g., include an anecdote) as they work to help their audiences accurately understand the how or why of a concept (**Explain**). Narratives can be embedded within other expository structures, such as those in the families of **Argue** and **Explain**. **Argue** can incorporate elements of many Key Language Uses as it seeks to show an audience the validity of a position.*



Learn more about each Key Language Use across the grades and disciplines in Section 4: Resources – Key Language Uses: A Closer Look.

Key Language Use Distribution Charts

Key Language Uses² come from a review of the literature and systematic analysis of the language demands of academic content standards. They represent the most prominent genre families in academic content standards.

All Key Language Uses are present across all grade levels and disciplines, and yet at each grade-level cluster and discipline, some are more prominent than others.

It is essential to understand that the emphasis placed on these four Key Language Uses is not intended to restrict curriculum and instruction, but to highlight the most prominent genre families as an organizing principle for the ELD standards.

The **most prominent Key Language Uses** identified in the analysis of academic content standards for each grade-level cluster are the **basis for its Language Expectations**. They are marked with an “x” in the dark blue boxes of the charts below. The medium and light shades of blue indicate lesser degrees of prominence of each Key Language Use.

Figure 10: Distribution of Most Prominent Key Language Uses, Grades K-12

Distribution of Most Prominent Key Language Uses in Grades 9-12 Across WIDA ELD Standards Statements					
WIDA ELD Standard		Narrate	Inform	Explain	Argue
1	Language for Social and Instructional Purposes	x	x	x	x
2	Language for Language Arts	x	x		x
3	Language for Mathematics			x	x
4	Language for Science			x	x
5	Language for Social Studies			x	x

Distribution of Most Prominent Key Language Uses in Grades 6-8 Across WIDA ELD Standards Statements					
WIDA ELD Standard		Narrate	Inform	Explain	Argue
1	Language for Social and Instructional Purposes	x	x	x	x
2	Language for Language Arts	x	x		x
3	Language for Mathematics			x	x
4	Language for Science			x	x
5	Language for Social Studies			x	x

Distribution of Most Prominent Key Language Uses in Grades 4-5

Across WIDA ELD Standards Statements

WIDA ELD Standard		Narrate	Inform	Explain	Argue
1	Language for Social and Instructional Purposes	x	x	x	x
2	Language for Language Arts	x	x		x
3	Language for Mathematics			x	x
4	Language for Science			x	x
5	Language for Social Studies			x	x

Distribution of Most Prominent Key Language Uses in Grades 2-3

Across WIDA ELD Standards Statements

WIDA ELD Standard		Narrate	Inform	Explain	Argue
1	Language for Social and Instructional Purposes	x	x	x	x
2	Language for Language Arts	x	x		
3	Language for Mathematics			x	x
4	Language for Science			x	x
5	Language for Social Studies			x	x

Distribution of Most Prominent Key Language Uses in Grade 1

Across WIDA ELD Standards Statements

WIDA ELD Standard		Narrate	Inform	Explain	Argue
1	Language for Social and Instructional Purposes	x	x	x	x
2	Language for Language Arts	x	x		
3	Language for Mathematics		x		
4	Language for Science		x	x	
5	Language for Social Studies		x		x

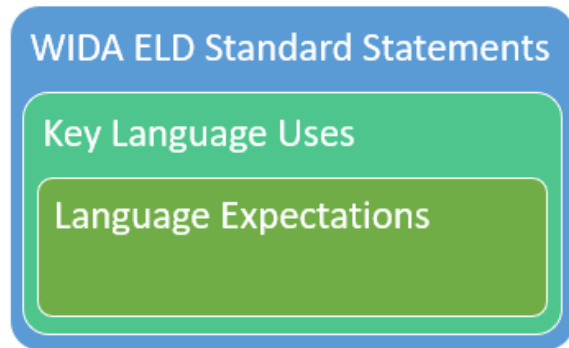
Distribution of Most Prominent Key Language Uses in Kindergarten

Across WIDA ELD Standards Statements

WIDA ELD Standard		Narrate	Inform	Explain	Argue
1	Language for Social and Instructional Purposes	x	x	x	x
2	Language for Language Arts	x	x		
3	Language for Mathematics		x		
4	Language for Science		x	x	
5	Language for Social Studies		x		

Language Expectations

Figure 11: WIDA ELD Standards Statements, Key Language Uses, and Language Expectations



The third component of the WIDA ELD Standards Framework, **Language Expectations**, adds greater specificity to the five standards statements and Key Language Uses. The Language Expectations are the statements most similar to what educators generally find in academic content standards. They make visible the language associated with academic content standards, concepts, and practices.

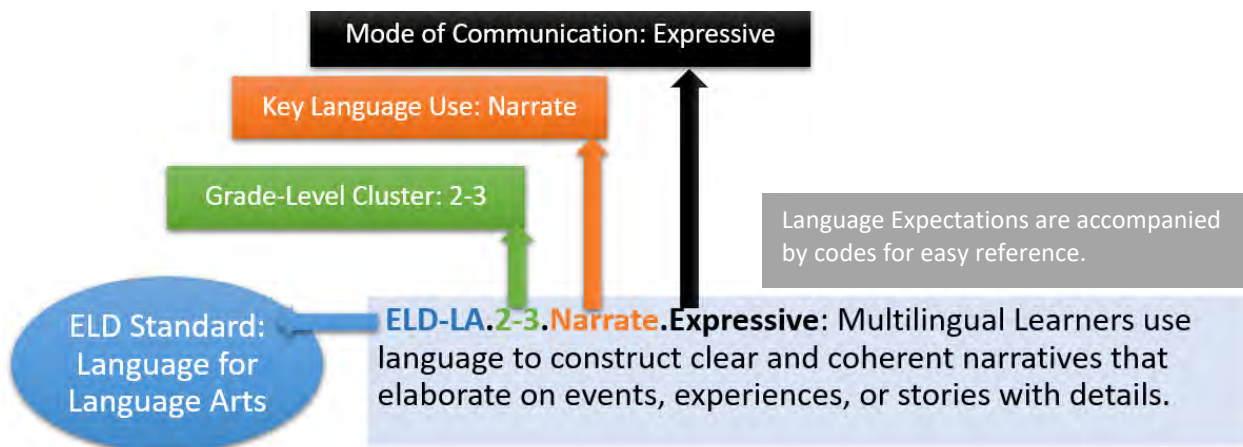
Language Expectations are goals for content-driven language instruction.

They identify what students need to do with language to meet the academic content expectations.

Language Expectations combine the four individual language domains (listening, speaking, reading, and writing) into two broader modes of communication: **interpretive** and **expressive**. The two broader modes of communication increase accessibility options.

- The **interpretive communication mode** encompasses listening, reading, and viewing
- The **expressive communication mode** encompasses speaking, writing, and representing

Figure 12: Codes for Language Expectations



Proficiency Level Descriptors

Proficiency Level Descriptors are the fourth and last component of the WIDA ELD Standards Framework. They are descriptions of how multilingual learners' linguistic repertoires expand as they move across six levels of English language proficiency.

Proficiency Level Descriptors

- Provide a description of language use in the interpretive and expressive communication modes across content areas and other social/instructional contexts
- Reflect language development of multilingual learners at designated grade-level clusters that correspond to those used with WIDA ACCESS for ELLs.
- Are anchored in the K-12 Performance Definitions (WIDA, 2012)

Educators should keep in mind...

Proficiency Level Descriptors show how multilingual learners use language at each of the six English language proficiency levels.

- Language use occurs within a sociocultural context. This context impacts both the message and the language used to convey that message.

- The Proficiency Level Descriptors are designed to be contextualized in activities that target the WIDA Language Expectations (e.g., disciplinary texts that have been adapted by purpose, topic, participants' identities and social roles, audience, and situation).

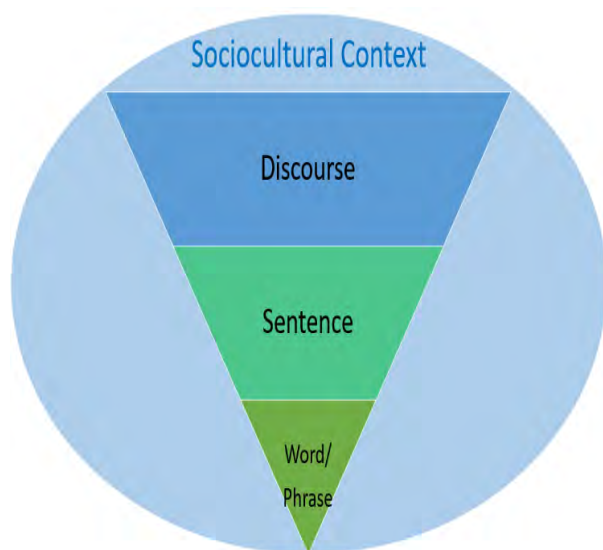
- The Proficiency Level Descriptors describe a progression of language use in concrete, shared contexts to increasing abstract, distant contexts [along the mode continuum]

- Each language proficiency level includes and builds on previous levels (e.g., student proficiency descriptors for the end of PL4 include the three previous sets of descriptors. $PL4 = PL1 + PL2 + PL3 + PL4$)

- Language development is not always linear. Multilingual learners may take various pathways to arrive at the end-of-level descriptors.

- The choice of scaffolding and multimodal communication (e.g., visual, auditory, tactile, kinesthetic)

for multilingual learners, including those with disabilities, should be based on both the communicative purpose of the situation and the student's level of language proficiency.



As multilingual learners gain proficiency in English, their abilities to effectively use language across each of the criteria increases accordingly.

As the figure below shows, the Discourse, Sentence, and Word/Phrase Dimensions of Language contain six interlocking criteria, each of which highlights an increasing range of linguistic resources and choices that multilingual learners can use to make meaning in context.

Figure 13: Features of Academic Language: Criteria Foci and Sample Features

The Features of Academic Language Operate within sociocultural contexts for language use.

Dimension	Criteria	Focus on . . .	Sample Features
Discourse	Organization of language	How language is organized to fulfill communicative purpose(s) and additional adjustments to language based on topic, participants' identities and social roles, audience, and situation	text that conveys integrated purposes; arrangement of relationships in elaborated or condensed sequences
	Cohesion of language	How language connected within and across sentences and discourse using a range of cohesive devices	repeated words, synonyms, pronoun substitution, transition words, connectors, given/new information
	Density of language	How important information in noun groups is expanded or contracted	added adjectives, added prepositional phrases, pre-and post modifiers to noun groups, nominalization
	Amount of language	How overall linguistic complexity progressively increases in discourse	clauses, sentences, a series of sentences, expanded or concise discourse
Sentence	Grammatical complexity of language	How sentence patterns vary and expand from simple to complex, with a focus on verb forms and different combinations of clauses	auxiliary verbs, infinitives, dependent clauses, passive structures, relative clauses
Word/Phrase	Precision of language	How everyday, general, and disciplinary language more precisely conveys a range of concrete-to-abstract contexts	cognates, collocations, shades of meaning, technical and abstract terms

Appropriate Uses of the WIDA Proficiency Level Descriptors

The Proficiency Level Descriptors might be used during . . .

- Collaboration between language development and content area educators
- Professional learning activities about language development
- School team discussions about a student's language instruction educational program (LIEP) or Individualized Education Program (IEP)
- Conversations with families in their preferred language

The Proficiency Level Descriptors might be used to . . .

- Design and differentiate classroom instruction assessment tasks and materials
- Get ideas for the appropriate complexity for linguistic supports and models at the next developmental/proficiency level
- Inform choices of text selection
- Empower teachers and students to discuss language performance and goals
- Monitor student progress (formative assessment) across activities that target the Language Expectations
- Evaluate evidence from student work (portfolio of speaking and writing samples) as part of special services eligibility processes

Inappropriate Uses of the WIDA Proficiency Level Descriptors

The Proficiency Level Descriptors should not be used as a sole source to define or categorize the multilingual learner or teacher.

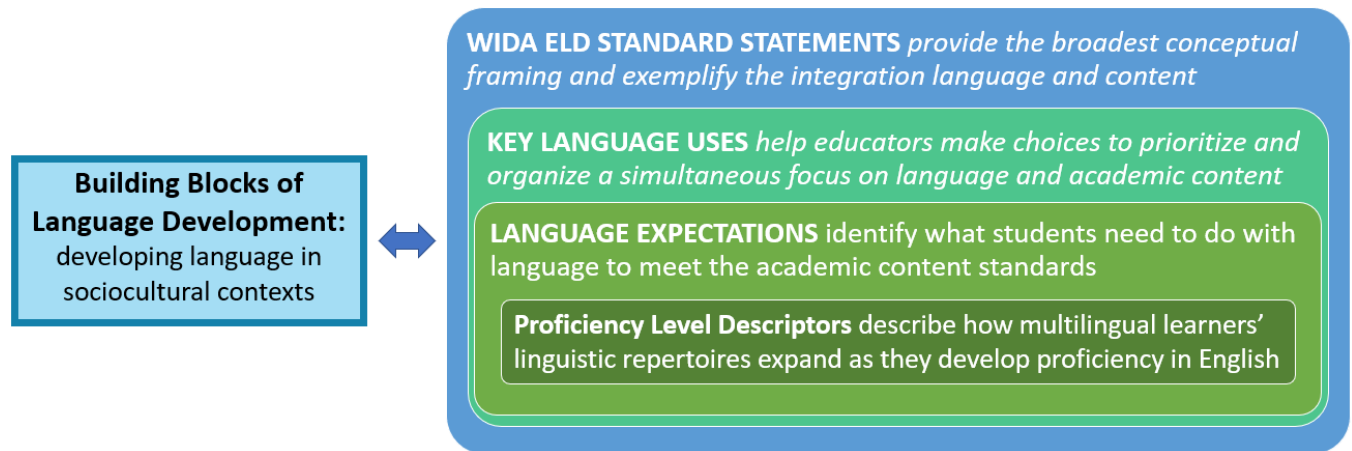
The Proficiency Level Descriptors should not be used as restrictive examples or as a finite list of student abilities. Nor should they be used to limit or prohibit access to opportunity to learn, rigorous, complex texts, conversations, or materials. Finally, the grade-level cluster Proficiency Level Descriptors should not be used as an excuse to lower expectations or slow student growth.

Proficiency Level Descriptors SHOULD NOT be used as the single document or as the only evidence in high-stakes situations such as . . .

- Identification for special education services, for example, trying to obtain cognitive support services solely based on Level 1 status
- Description of cognitive ability
- Identification of student readiness abilities
- Tracking for remediation or enrichment
- Grading in report cards
- Consideration for grade placement or retention
- Evaluation of teachers

Building Blocks of Language Development in the WIDA ELD Standards Framework

The four components of the WIDA ELD Framework can be conceptualized as building blocks of language development in sociocultural contexts, starting from the ELD standards statements.



Photo

The WIDA ELD Standards Framework: What It is and What It is Not

The WIDA ELD Standards Framework, in partnership with cross-disciplinary academic content standards, define the language multilingual learners need as they move toward college, career, and civic readiness. It is designed to accentuate the linguistic and cultural assets of multilingual learners, and can readily work in conjunction with other resources for students who are developing multiple languages.

The Standards Framework does not—indeed, cannot—enumerate all or even most of the language of school. The standards must therefore be complemented by a well-developed, content-rich curriculum (see resources for curriculum design on Section 4: Curricular Considerations) and effective pedagogical approaches for multilingual learners.

Figure 14: What the WIDA ELD Framework is and What it is not.

The WIDA ELD Standards Framework is	The WIDA ELD Standards Framework is NOT intended to be
<ul style="list-style-type: none"> • A description of clear and measurable goals for language learning represented by <ul style="list-style-type: none"> ◦ Language Expectations for interpretive and expressive modes of communication ◦ Grade-level cluster Proficiency Level Descriptors of what multilingual learners can do at consecutive language proficiency levels • A guide for informing the design of linguistically and culturally sustaining curriculum, instruction, and assessment • A resource for state, district, and school accountability • A central component of the comprehensive WIDA research-based system of language standards, assessment, and professional learning 	<ul style="list-style-type: none"> • Statements of grade-level knowledge and skills • A prescriptive document to be enacted without consideration for the local context • A de facto curriculum or course of study • Specific lessons associated with units of learning with a series of language objectives • A step-by-step process for teaching and learning • An endorsement for any particular language pedagogy • A form of evaluation or a basis for grading • A compendium of academic content standards and disciplinary practices



Section 3: Grade-level Cluster Materials

- Grade 1
- Grades 4-5
- Grades 9-12



GRADE 1

WIDA English Language Development Standards

- WIDA ELD Standards, Language Expectations, Functions, and Features
- Annotated Language Samples
- Proficiency Level Descriptors

GRADE 1 Introduction

In Grade 1, multilingual learners may easily connect school to home by sharing observations about the world with family members in multiple languages. For example, academic learning can readily be reinforced simply by walking around the neighborhood to describe plant life or notice environmental print. In school, multilingual learners tend to ask and answer questions about the world, themselves, and texts in multimodal ways (e.g., oral, visual, or written). Multicultural books allow for students to practice academic concepts and procedures at home and in school. Working with partners or in small groups, first graders feel proud to share their discoveries with others as they make connections among ideas, illustrations, and words.

In Grade 1 materials you will see:

- **WIDA ELD Standards Statements** – Language for Social and Instructional Purposes, Language for Language Arts, Language for mathematics, Language for Science, and Language for Social Studies – provide broad conceptual framing of language and content integration.
- **Key Language Uses (KLUs)** – Inform, Narrate, Explain, Argue – select genre families summarizing the most prominent language uses across disciplines.
 - **Distribution Charts for KLUs** – the most prominent KLUs in a given grade-level cluster.
- **Language Expectations** – goals for content-driven language instruction.
 - **Summary Table** – a compilation of interpretive and expressive Language Expectations.
 - **Language Functions** – purposes for language use that allow students to work toward meeting Language Expectations.
 - **Language Features** – linguistic structures that help shape the Language Functions.
 - **Annotated Language Samples** – exemplars that show the Language Expectations, Functions, and Features contextualized in authentic grade-level texts.
- **Proficiency Level Descriptors** – descriptions of how multilingual learners’ linguistic repertoires expand across six levels of English language proficiency.

Most Prominent Key Language Uses for Grade 1






Key Language Uses come from a review of the literature and systematic analysis of the language demands of academic content standards. They represent the most prominent genre families in academic content standards.

It is essential to understand that the emphasis placed on these four Key Language Uses is not intended to restrict curriculum and instruction, but to highlight the most prominent genre families as an organizing principle for the ELD standards.

All Key Language Uses are present across all grade levels and disciplines, and yet at each grade-level cluster and discipline, some are more prominent than others.

The **most prominent Key Language Uses** identified in the analysis of academic content standards for Grade 1 are the **basis for its Language Expectations**. They are marked with an “x” in the dark green boxes of the chart below. The medium and light shades of green indicate lesser degrees of prominence of each Key Language Use.

Distribution of Most Prominent Key Language Uses in Grade 1 Across WIDA ELD Standards Statements

WIDA ELD Standard	Narrate	Inform	Explain	Argue
 1. Language for Social and Instructional Purposes	X	X	X	X
 2. Language for Language Arts	X	X		
 3. Language for Mathematics		X		
 4. Language for Science		X	X	
 5. Language for Social Studies		X		X

Most Prominent Key Language Uses: Grade 1 Key



Present



Prominent




Most Prominent

Learn more about each Key Language Use across the grades and disciplines in Section 4: Resources—Key Language Uses: A Closer Look.

GRADE 1 Language Expectation Summary Tables

Language Expectations, organized by prominent Key Language Uses, specify what students are expected to do with language to meet content expectations. The **Summary Tables** are a compilation of interpretive and expressive Language Expectations for Grade 1. Learn more about Language Expectations and Key Language Uses in the first section of this book.

- For an additional way of looking at K-12 Language Expectations by WIDA ELD Standard Statement corresponding to the core disciplines (Language Arts, Mathematics, Science, and Social Studies), see Appendix E: Meeting ESSA Requirements.
- For ideas on how to use Language Expectations in unit-level curricular design, see Section 4: Curricular Considerations

 WIDA ELD Standard 1 – English language learners communicate for SOCIAL AND INSTRUCTIONAL purposes within the school setting	
Interpretive Language Expectations Multilingual learners use language to...	Expressive Language Expectations Multilingual learners use language to...
ELD-SI.K-5.Inform.Interpretive: Interpret information about social and instructional topics, tasks, and situations by identifying its main ideas and details.	ELD-SI.K-5.Inform.Expressive: Share information for social and instructional purposes by identifying, classifying, describing, or comparing/contrasting ideas.
ELD-SI.K-5.Narrate.Interpretive: Interpret narratives about social and instructional topics, tasks, and situations by identifying their main ideas and details as well as following the development of story elements.	ELD-SI.K-5.Narrate.Expressive: Construct narratives for social and instructional purposes and to engage, inform, or entertain audiences.
ELD-SI.K-5.Explain.Interpretive: Interpret explanations about social and instructional topics, tasks, and situations by identifying how or why things are as they are.	ELD-SI.K-5.Explain.Expressive: Construct explanations about social and instructional topics, tasks, and situations by identifying how or why things are as they are.
ELD-SI.K-5.Argue.Interpretive: Interpret arguments by identifying their perspective about social and instructional topics, tasks, and situations.	ELD-SI.K-5.Argue.Expressive: Construct arguments for social and instructional purposes to share opinions with supporting reasons.



WIDA ELD Standard 2 – English language learners communicate information, ideas and concepts necessary for academic success in the content area of **LANGUAGE ARTS**

Interpretive Language Expectations Multilingual learners use language to...	Expressive Language Expectations Multilingual learners use language to...
ELD-LA.1.Inform.Interpretive: Interpret key concepts from text, visuals, and oral information in Language Arts, identifying their attributes, qualities, or characteristics.	ELD-LA.1.Inform.Expressive: Share information in Language Arts with illustrations and/or actions to define concepts and compare/contrast objects, characters, or books.
ELD-LA.1.Narrate.Interpretive: Identify topics of narratives in Language Arts and the order and details of events, experiences, or stories.	ELD-LA.1.Narrate.Expressive: Develop narratives in Language Arts to recount the order and details of events, experiences, or stories, providing some sense of closure.



WIDA ELD Standard 3 – English language learners communicate information, ideas and concepts necessary for academic success in the content area of **MATHEMATICS**

Interpretive Language Expectations Multilingual learners use language to...	Expressive Language Expectations Multilingual learners use language to...
ELD-MA.1.Inform.Interpretive: Interpret detailed mathematical information from texts, visuals, and oral language by identifying and classifying quantities, attributes, and procedures for solving problems.	ELD-MA.1.Inform.Expressive: Share detailed mathematical information to identify, describe, and compare/contrast quantities, attributes, and procedures for solving problems.



WIDA ELD Standard 4 – English language learners communicate information, ideas and concepts necessary for academic success in the content area of **SCIENCE**

Interpretive Language Expectations Multilingual learners use language to...	Expressive Language Expectations Multilingual learners use language to...
ELD-SC.1.Inform.Interpretive: Interpret detailed scientific information from texts, real world visuals, and oral language by identifying and classifying entities or concepts using objects and/or real world visuals.	ELD-SC.1.Inform.Expressive: Share detailed scientific information by identifying, classifying, describing, and comparing/contrasting entities or concepts by their attributes, qualities, and characteristics using objects and/or real world visuals.
ELD-SC.1.Explain.Interpretive: Interpret scientific explanations by identifying details about how or why things work	ELD-SC.1.Explain.Expressive: Explain orally how or why things work in present or past tense declarative statements and some expanded phrases with objects and/or real world visuals.



WIDA ELD Standard 5 – English language learners communicate information, ideas and concepts necessary for academic success in the content area of **SOCIAL STUDIES**

Interpretive Language Expectations Multilingual learners use language to...	Expressive Language Expectations Multilingual learners use language to...
ELD-SS.1.Argue.Interpretive: Identify the purpose, perspective, and claims of Social Studies arguments.	ELD-SS.1.Argue.Expressive: Construct Social Studies arguments with clear claim statements connected to supporting ideas and details.
ELD-SS.1.Explain.Interpretive: Interpret Social Studies explanations by identifying details related to events or phenomena.	ELD-SS.1.Explain.Expressive: Explain orally how or why events or phenomena occur(ed) in declarative statements with connected details.

GRADE 1 Language Expectations, Functions and Features

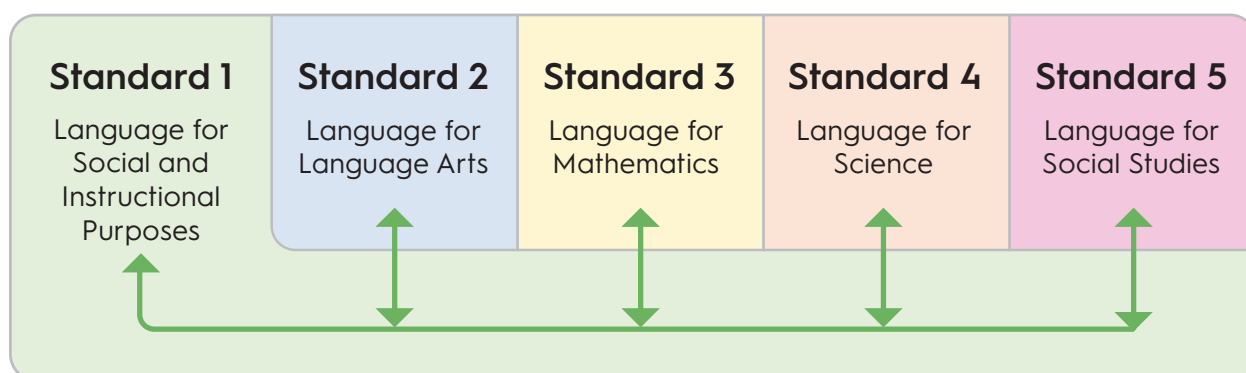
Language Expectations are goals for content-driven language instruction. Each Language Expectation for Grade 1 is presented here with **commonly associated Language Functions and Language Features**. These building blocks of language development help educators begin to unpack the Language Expectations.

GRADE 1



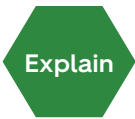

WIDA ELD STANDARD 1 Social and Instructional Language

Language for Social and Instructional Purposes is connected to the language of WIDA's other four standards, as shown below, and applies across a range of educational contexts and language proficiency levels.



Language for Social and Instructional Purposes (WIDA ELD Standard 1) is broader in scope and applicability than the other four ELD standards that are associated with discipline-specific learning. Therefore, Language Expectations, Functions and Features for Standard 1 are presented in two grade-level clusters: K-5 and 6-12, whereas the other four WIDA ELD standards present Language Expectations, Functions, and Features according to each grade-level cluster (K, 1, 2-3, 4-5, 6-8, 9-12).

WIDA ELD Standard 1 – English language learners communicate for SOCIAL AND INSTRUCTIONAL purposes within the school setting		
Inform	ELD-SI.K-5.Inform.Interpretive: Interpret information about social and instructional topics, tasks, and situations by identifying its main ideas and details.	ELD-SI.K-5.Inform.Expressive: Share information for social and instructional purposes by identifying, classifying, describing, or comparing/contrasting ideas.
Narrate	ELD-SI.K-5.Narrate.Interpretive: Interpret narratives about social and instructional topics, tasks, and situations by identifying their main ideas and details as well as following the development of story elements.	ELD-SI.K-5.Narrate.Expressive: Construct narratives for social and instructional purposes and to engage, inform, or entertain audiences.

WIDA ELD Standard 1 – English language learners communicate for SOCIAL AND INSTRUCTIONAL purposes within the school setting		
	ELD-SI.K-5.Explain.Interpretive: Interpret explanations about social and instructional topics, tasks, and situations by identifying how or why things are as they are.	ELD-SI.K-5.Explain.Expressive: Construct explanations for social and instructional purposes with statements connected to visuals, details, or data.
	ELD-SI.K-5.Argue.Interpretive: Interpret arguments by identifying their perspective about social and instructional topics, tasks, and situations.	ELD-SI.K-5.Argue.Expressive: Construct arguments for social and instructional purposes to share opinions with supporting reasons.

Language Functions and Language Features

As they work toward meeting the Language Expectations, multilingual learners might...

Ask different types of questions related to a phenomenon/plot/problems/reasoning, through...

- Interrogatives including Wh- questions and Yes or No questions to:
 - recall (e.g., *What are the parts of a plant?*)
 - comprehend (e.g., *What happens to? Where does ... ?*)
 - apply (e.g., *How can you use this information?*)
 - analyze (*Is ... Are you sure.. Is it possible... ?*)
 - synthesize (e.g., *Based on the information we discussed, what can you say about...?*)
 - evaluate (e.g., *How important was the information provided?*)
- Declarative statements used as questions (e.g., *I wonder*)
- Everyday language to clarify (e.g., *How did you get that? Why did you draw that?*)

Give directions to tell someone how to do or make something, through...

- Doing verbs stated as imperatives (e.g., **line up** by the door, **follow** the directions, **take** a left, **listen** to the leader)
- Sequential language (e.g., *after, before adding*)
- Language of place (where), manner (how), and time (when) adds details, numerical information, to make precise meanings using everyday language (e.g., here's how you clean your desk: *take all the stuff **out of your desk**, put all the pencils **into your pencil bag***)

Make tentative claims, personal opinions, predictions, and suggestions, through...

- A variety of verbs (e.g., *I think, I wonder if, it appears to...*)
- Clauses communicating suggestions (e.g., *we should try ... It's likely/unlikely/possible that... it may/might/can/could be, It seems to...*)

Restate or summarize an idea,, through...

- Saying verbs (e.g., *She said, He asked, They suggested...*)
- Clauses that summarize (e.g., *all this means is , they are all showing that ...*)

Question someone's idea through...

- Interrogatives (e.g., *Why did you say that?, What's your evidence ... ? How did you get?*)
- Statements with causal language (e.g., *It won't work because, I think that's wrong because...*)

Compare and contrast ideas/objects/characters/solutions, through...

- Demonstrative pronouns (*this, those, that*)
- Comparative language (e.g., *similar to, different from, meaner, stronger, smarter, kinder, bigger, smaller, better than...*)

Make observations, describe and record them, through...

- Verbs for observing (e.g., *notice, see, observe*)
- Clauses that introduce explanations and link to previously presented information
- Language adds details, numerical information, manner (how) and location (where) to make precise meanings (e.g., *the bar graph on the left shows that there is more...*)
- Noun groups with everyday language and specific technical terms (e.g., *LED light, battery, the positive side of the LED light, wire, aluminum foil*)

Recount sequence of steps/what was done in an experiment, through...

- Information organized sequentially either through sequence language or through numbered steps
- Doing verbs to recount actions taken in past tense (e.g., *added, mixed, combined*)
- Noun groups using everyday language to create precise meanings (e.g., *four corners of the room, the whole thing, the lines that never cross, the lines that make an x*)
- Everyday language used with precision describe observable and unobservable features (e.g., *electricity needs a path to go through*)
- Diagrams, graphs, and pictures representations to show processes involved



WIDA ELD Standard 2 – English language learners communicate information, ideas and concepts necessary for academic success in the content area of **LANGUAGE ARTS**

ELD-LA.1.Inform.Interpretive: Interpret key concepts from text, visuals, and oral information in Language Arts, identifying their attributes, qualities, or characteristics

ELD-LA.1.Inform.Expressive: Share information in Language Arts with illustrations and/or actions to define concepts and compare/contrast objects, characters, or books.

Language Functions and Language Features

As they work toward meeting the Language Expectations, multilingual learners might...

Organize and connect ideas in text in ways that support its purpose (give generalized information about entity or an entire class of things e.g., *types of animals*), through...

- Lexical cohesion created through repetition
- Repetition of topic as starting point of sentences or paragraph

Determine what the informational text is about, through...

- Noticing and tracking words that are repeated (e.g., *whales, humpback whales, different species of whales*)
- Identifying categories (diet, habitat, behavior)

Define key concepts, through...

- Technical terms to represent a class of things (e.g., *marsupials*)
- Declarative statements with relating verbs to define, describe, and classify (e.g., *Dolphins are mammals. Cats are felines.*)
- Timeless present to indicate the general nature of the information (e.g., *swim, eat, sleep*)

Provide details about attributes, qualities, characteristics about the entity, through...

- Simple noun groups pack information detailing attributes, qualities, characteristics, mainly through adjectives (e.g., *the domesticated cat*)
- Language of place and time (e.g., *in the trees, indoors, every year, through the blowhole*)

Link ideas across sections of text, through...

- Reference devices (pronouns, synonyms)

Compare and contrast objects, characters, or books, through...

- Demonstrative pronouns (e.g., *this, those, that*)
- Comparative language (e.g., *bigger, smaller, better than...*)



WIDA ELD STANDARD 2

Language for Language Arts

WIDA ELD Standard 2 – English language learners communicate information, ideas and concepts necessary for academic success in the content area of **LANGUAGE ARTS**

ELD-LA.1.Narrate.Interpretive: Identify topics of narratives in Language Arts and the order and details of events, experiences, or stories.

ELD-LA.1.Narrate.Expressive: Develop narratives in Language Arts to recount the order and details of events, experiences, or stories, providing some sense of closure.

Language Functions and Language Features

As they work toward meeting the Language Expectations, multilingual learners might...

Orient the reader/listener to the narrative text type (stories or histories), through...

- Introduction with pictures, descriptive titles and/or opening statements
- Language of setting/place (*in the summer*) and time (*before the birds were awake*)
- Doing and thinking verbs to set up characters

Describe characters, through...

- Verb groups to describe what characters do, what they are thinking, feeling, and saying
- Noun groups add detail

Develop the narrative with complications, time sequences, event sequences, resolutions to build a coherent story or account, through...

- Simple sentence types
- Connectors that combine and link text details and events (*and, but, so*), signal time (*first, next, and then*), and sequence events (*first, second, before, after*)
- Cohesive devices used to create continuity and flow (repetition, pronouns [*I, he, she, theirs*], demonstratives [*this, that, those*])

Engage the audience, through...

- Evaluative language to share one's attitudes through the use of common adjectives (e.g., *beautiful, friend, scary*)
- Pictures and other graphics
- Punctuation and interrogatives to build excitement (e.g., *You won't believe what happened next!*)



WIDA ELD Standard 3 – English language learners communicate information, ideas and concepts necessary for academic success in the content area of **MATHEMATICS**

ELD-MA.1.Inform.Interpretive: Interpret detailed mathematical information from texts, visuals, and oral language by identifying and classifying quantities, attributes, and procedures for solving problems.

ELD-MA.1.Inform.Expressive: Share detailed mathematical information to identify, describe, and compare/contrast quantities, attributes, and procedures for solving problems.

Language Functions and Language Features

As they work toward meeting the Language Expectations, multilingual learners might...

Define or classify concept or entity, through...

- Technical terms (e.g., *rectangles*)
- Declarative statements with relating verbs define, describe, and classify (e.g., *Rectangles have four sides. There are many different kinds of shapes.*)

Describe a mathematical concept or entity, through...

- Expanded noun groups (e.g., *the sum of these numbers*)
- Numerals or classifiers that describe the entity (e.g., *these have four sides, circles have no sides.*)
- Conditional clauses (*if/then*) that express conditional relationships (e.g., *if the shape has 3 sides then it is a triangle*)

Compare/Contrast mathematical concepts or entities, through...

- Comparison/contrast language (e.g., *both, same, different*)
- Reasoning expressed through causal language (e.g., *The two groups are the same because*)



WIDA ELD Standard 4 – English language learners communicate information, ideas and concepts necessary for academic success in the content area of **SCIENCE**

ELD-SC.1.Inform.Interpretive: Interpret detailed scientific information from texts, real world visuals, and oral language by identifying and classifying entities or concepts using objects and/or real world visuals.

ELD-SC.1.Inform.Expressive: Share detailed scientific information by identifying, classifying, describing, and comparing/contrasting entities or concepts by their attributes, qualities, and characteristics using objects and/or real world visuals.

Language Functions and Language Features

As they work toward meeting the Language Expectations, multilingual learners might...

Organize text to meet its purpose (give generalized information about entity or an entire class of things e.g., *types of animals*), through...

- Lexical cohesion created through repetition
- Topic repeated as starting point of sentences or paragraph

Determine what the informational text is about, through...

- Noticing and tracking words that are repeated (e.g., *whales, humpback whales, different species of whales*)
- Identifying categories (diet, habitat, behavior)

Define or classify concept or entity, through...

- Nouns that represent class of things (e.g., *marsupials*)
- Declarative statements with relating verbs define, describe, and classify (e.g., *Dolphins are mammals. Cats belong to the feline family.*)

Describe a science concept or entity, through...

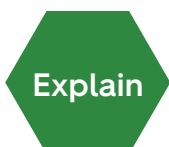
- Expanded noun groups (e.g., *all of the floating objects...*)
- Classifiers that describe the entity (e.g., *these nocturnal animals*)
- Conditional clauses that express conditional relationships (e.g., *if the it sinks, then it's...*)

Provide details about attributes, qualities, characteristics about the entity, through...

- Adjectives that describe the entity (e.g., *has long fur.*)
- Timeless present that indicate the general nature of the information (e.g., *swim, eat, sleep*)
- Language of place and time (e.g., *in the trees, indoors, every year, through the blowhole*)

Compare and contrast objects, through...

- Compare/contrast language (e.g., *both of them have..., similar to, different from, bigger, smarter than, more beautiful, better than...*)
- Causal clause that provide reasoning (e.g., *The two groups are the same because*)



WIDA ELD Standard 4 – English language learners communicate information, ideas and concepts necessary for academic success in the content area of **SCIENCE**

ELD-SC.1.Explain.Interpretive: Interpret scientific explanations by identifying details about how or why things work

ELD-SC.1.Explain.Expressive: Explain orally how or why things work in present or past tense declarative statements and some expanded phrases with objects and/or real world visuals.

Language Functions and Language Features

As they work toward meeting the Language Expectations, multilingual learners might...

Describe observations of a phenomenon or data gathered about a phenomenon, through...

- Phenomenon defined using relating verbs (e.g., *The life cycle of a frog has several stages*)
- Relating verbs that state relationships or attributes (e.g., *have, be, belong to*)
- Diagrams, graphics, data, statistics that add information or illustrate content

Explain how something works, through...

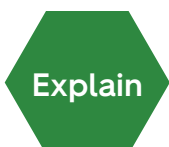
- Technical terminology (e.g., *tadpole, life cycle*)
- Language of time and place that indicates places where stages or events occur

Relate how a series of events causes something to happen, through...

- Causal language that express cause and effect relationships (e.g., *gets smaller, gets even smaller*)
- Connectors that express sequences in time (e.g., *first, next, last*)

Interpret and describe data, through...

- Visual data displays (charts, graphs)
- Declarative statements present data (e.g., *we used two straws*)
- Evaluative language that compare variables (e.g., *the long straw worked **better***)



WIDA ELD Standard 5 – English language learners communicate information, ideas and concepts necessary for academic success in the content area of **SOCIAL STUDIES**

ELD-SS.1.Explain.Interpretive: Interpret Social Studies explanations by identifying details related to events or phenomena.

ELD-SS.1.Explain.Expressive: Explain orally how or why events or phenomena occur(ed) in declarative statements with connected details.

Language Functions and Language Features

As they work toward meeting the Language Expectations, multilingual learners might...

Orient reader/listener to the phenomena or historical event relating explained, through...

- Language that speaks to the reader directly and draws them in (*Did you know?, Why? In fact*)
- Relating verbs (is, are) that define phenomenon or event (e.g., *A desert is hot*)

Organize and connect ideas in ways that support the purpose of the text, through...

- Connectors that sequence factors and examples (e.g., *First, another*) and time markers that order events (*after an earthquake, millions of years later*)
- Starting points of sentences that establish cohesion through repetition and pronoun referencing
- Causal connectors that express causal relationships between events (e.g., *because, so that*)

Set a context for understanding the outcome and the factors, through...

- Declarative statements with little evaluation that provide detail on who, where, when (e.g., *Gorillas live in Africa.*)
- Action verbs in past tense that describe events (*cut down, eat*)
- Prepositional phrases that add spatial and directional details (*The river flows **down the mountain***)

Relate the factors that contribute to a particular outcome, through...

- Single nouns representing abstract concepts (e.g., *habitat, community*)
- Expanded noun groups including adjectives that answer questions about how many, and what something is like (*seven continents, longest river*)
- Evaluative language (e.g., *better, best*)



WIDA ELD STANDARD 5 Language for Social Studies

WIDA ELD Standard 5 – English language learners communicate information, ideas and concepts necessary for academic success in the content area of **SOCIAL STUDIES**

ELD-SS.1.Argue.Interpretive: Identify the purpose, perspective, and claims of Social Studies arguments.

ELD-SS.1.Argue.Expressive: Construct Social Studies arguments with clear claim statements connected to supporting ideas and details.

Language Functions and Language Features

As they work toward meeting the Language Expectations, multilingual learners might...

Orient reader/listener to the issue and purpose of argument, through...

- Declarative statement that names position (e.g., *People can help animals*)
- Background information that typically defines the author's relationship to the topic

Select relevant ideas and details that support claims with evidence from sources, through...

- Sentences adding details and examples (e.g., *All animals need food. People can feed animals*)
- Language of time place, manner and what happened (e.g., *last year, in our town*)
- Doing verbs (e.g., *helped, fed, took care of*) that construct agency and make who did what to whom transparent

Show relationships between claims and evidence, and reasoning, through...

- Connectors that link claims with evidence and reasoning (e.g., *because, so, and*)
- Connectors that show concession or compare and contrast (e.g., *if, but*)

Organize and connect ideas in ways that support the purpose of the argument, through...

- Reference devices that create cohesion through repetition and pronouns



Expressive Language Expectation: Multilingual learners use language to....

ELD-SC.1.Inform.Expressive: Share detailed scientific information by identifying, classifying, describing, and comparing/contrasting entities or concepts by their attributes, qualities, and characteristics using objects and/or real world visuals.

Author: A teacher who wanted to model for her class how to write sequential explanations in science about the phenomena they were observing.

Task/Situation: Class deconstructed this text together, examined the stages of the text and how language was used in it, then jointly constructed a **similar text about the life cycle of a butterfly**.

Credit: Rachel Ellis, Northampton Public Schools

Language Functions and Features for...

Enacting a relationship with the reader:

Identify a perspective

- First person avoided to construct scientific authority
- Declarative statements construct facts

Constructing a cohesive message:

Organize and connect ideas

- Connectors indicate sequence of steps in the cycle (**First, next, then, finally, again**)

The Life Cycle of a Frog

The life cycle of a frog has several stages.

First, a tadpole **hatches** out of an egg. It looks like a little fish. **Next**, the tadpole **grows** two back legs and its tail gets smaller. It is now called a "froglet." **Then**, it **grows** two front legs and the tail gets even smaller. **Finally**, it is a full-grown adult frog with four legs and no tail.

Adult frogs can lay more eggs and the life cycle starts **again**.

Language Functions and Features for...

Presenting ideas:

Explain how the life cycle of the frog happens

- Relating verb groups (has, is) with expanded noun groups describe attributes

Describe observations

- Doing verbs explain how (hatches, grows, grows)

** content and layout not final*

The WIDA Proficiency Level Descriptors outline an interlocking set of criteria to use when measuring multilingual learner language performance in activities that target the WIDA Language Expectations. Each language proficiency level is cumulative, building on previous levels (e.g., PL 4 = PL1 + PL 2 + PL3 + PL4).

Dimension	End of Level 1 Entering	End of Level 2 Emerging	End of Level 3 Developing	End of Level 4 Expanding	End of Level 5 Bridging	Level 6 Reaching
	As multilingual learners near the END of each proficiency level, and with appropriate scaffolding and multimodal communication, they will make meaning by processing:					
Discourse Organization of language	Text that explicitly signals a narrow range of common social purposes or instructional routines	Text that conveys an increasing range of common social purposes or instructional routines	Text that conveys a wide range of common social purposes or instructional routines	Text that conveys a clearly signaled purpose; with relationships explicitly arranged in a short sequence	Text that conveys a clearly signaled purpose; with relationships explicitly arranged in a short sequence (with a few details)	Text that conveys a clearly signaled purpose; with relationships extended into a longer sequence
Cohesion of language	Ideas linked by repeated words	Ideas linked by synonyms	Ideas linked by closely associated words; basic connectors	Ideas linked by common sequencing connectors	Ideas linked by pronoun substitution; contrasting connectors	Ideas linked by an umbrella (superordinate) term; common comparative connectors
Density of language	Explicitly signaled information found in simple noun group with an adjective added before noun	Explicitly signaled information found in simple noun group with a few adjectives or adverbs added before noun	Important information found in simple noun group with an expanded adjective group added before noun	Important information found in simple noun groups with prepositional phrase added after noun	Important information found in expanded noun groups with relative clauses added before or after nouns	Important information found in expanded noun groups with relative clauses added after nouns
Amount of language	Word/phrases and clauses	A variety of short sentences	Short, predictable sentences	An increasing variety of short sentences	A series of sentences	Short, connected discourse
Sentence Grammatical complexity of language	Simple phrasal patterns or memorized chunks of language	Simple sentences with subjects, active verbs, and direct objects	Simple sentences	Simple sentences with passive structures	Complex sentences beginning with a dependent clause	Complex sentences with relative clauses, sometimes omitting the connector word
Word/Phrase Precision of language	High frequency everyday, general, disciplinary language in concrete, immediate contexts	A narrow range of everyday language, including irregular forms in concrete, immediate contexts	An increasing range of everyday language, including simple contrasting pairs of words	A narrow range of general language, including an additional, increasingly abstract meanings [to everyday language]	An increasing range of general language, including collocations and cognates	A wide range of general and disciplinary language, including new words constructed from prefixes, suffixes, and other word structures

Expressive Communication Modes

WIDA Proficiency Level Descriptors for Speaking, Writing, and Representing

Dimension	End of Level 1 Entering	End of Level 2 Emerging	End of Level 3 Developing	End of Level 4 Expanding	End of Level 5 Bridging	Level 6 Reaching
	As multilingual learners near the END of each proficiency level, and with appropriate scaffolding and multimodal communication, they will make meaning by processing:					
Discourse Organization of language	Text that conveys an extremely narrow range of common social purposes or instructional routines	Text that conveys a narrow range of common social purposes or instructional routines	Text that conveys an increasing range of common social purposes or instructional routines	Text that conveys a wide range of common social purposes or instructional routines	Text that more consistently conveys a clearly signaled purpose; with relationships arranged in a short sequence	Text that more consistently conveys a clearly signaled purpose; with relationships extended into a longer sequence
Cohesion of language	Ideas linked by common representations	Ideas linked by simple demonstratives (this, that)	Ideas linked by antonyms	Ideas linked by sequencing connectors	Ideas linked by pronoun substitution; contrasting connectors	Ideas linked by an umbrella (superordinate) term; common comparative connectors
Density of language	Explicitly signaled information found in isolated common noun	Explicitly signaled information found in simple noun group with articles (the, a)	Important information found in simple noun group with adjectives and adverbs added before or after noun	Information easily found in simple noun group; prepositional phrases added after noun	Information easily found in simple noun group;; adjectives added before or after noun	Important information found in simple noun groups; increasing range of prepositional phrases
Amount of language	Isolated word/phrases and clauses	Word/phrases and clauses	A few short sentences	One-to-two complete sentences	An increasing variety of short sentences	A series of sentences
Sentence Grammatical complexity of language	Isolated or memorized chunks of language; little or no control	Isolated or memorized chunks of language or simple phrasal patterns; little or no control	Simple sentences with basic connectors between noun groups or between verb groups; limited control	Simple sentences with adverbs; variable control	Simple sentences with two-word verbs; occasional control	Simple sentences with auxiliary verbs and prepositional phrases; with control
Word/Phrase Precision of language	Highest frequency everyday, general, and disciplinary language in concrete, immediate contexts	A narrow range of everyday and general language in concrete, immediate contexts	An increasing range of everyday and general language including irregular forms	An increasing range of general language, including an additional meaning [to everyday language]	A wider range of general language, including collocations [commonly paired words] and cognates	An increasing range of disciplinary language, including words and phrases with a common schema

A photograph of two young students, a boy and a girl, looking intently at a tablet computer. The boy is on the left, pointing at the screen with his right index finger. The girl is on the right, looking down at the tablet. They are both wearing backpacks. In the background, there are colorful triangular flags hanging from a string. The overall scene is bright and educational.

GRADES 4-5

WIDA English Language Development Standards

- WIDA ELD Standards, Language Expectations, Functions, and Features
- Annotated Language Samples
- Proficiency Level Descriptors

GRADES 4-5 Introduction

In the upper elementary grades, the classroom is bustling with activity, as learners interact, interpret, and express themselves in multimodal ways.

Classrooms are windows for multilingual learners to make discoveries while using their language repertoire in content area learning. The oral and written language of fourth and fifth graders is becoming more sophisticated, and multilingual learners are increasing their range of numeracy, literacy, and other academic experiences through multiple languages and cultures. Authentic hands-on activities offer opportunities for multilingual learners to interact in pairs and small groups using multiple languages to enhance their learning. Collaborating in teams, multilingual learners rely on each other to problem-solve, dialogue, and build relationships with their peers as they share the world around them.

In Grades 4-5 materials you will see:

- **WIDA ELD Standards Statements** – Language for Social and Instructional Purposes, Language for Language Arts, Language for mathematics, Language for Science, and Language for Social Studies – provide broad conceptual framing of language and content integration.
- **Key Language Uses (KLUs)** – Inform, Narrate, Explain, Argue – select genre families summarizing the most prominent language uses across disciplines.
 - **Distribution Charts for KLUs** – the most prominent KLUs in a given grade-level cluster.
- **Language Expectations** – goals for content-driven language instruction.
 - **Summary Table** – a compilation of interpretive and expressive Language Expectations.
 - **Language Functions** – purposes for language use that allow students to work toward meeting Language Expectations.
 - **Language Features** – linguistic structures that help shape the Language Functions.
 - **Annotated Language Samples** – exemplars that show the Language Expectations, Functions, and Features contextualized in authentic grade-level texts.
- **Proficiency Level Descriptors** – descriptions of how multilingual learners’ linguistic repertoires expand across six levels of English language proficiency.

Most Prominent Key Language Uses for Grades 4-5






Key Language Uses come from a review of the literature and systematic analysis of the language demands of academic content standards. They represent the most prominent genre families in academic content standards.

It is essential to understand that the emphasis placed on these four Key Language Uses is not intended to restrict curriculum and instruction, but to highlight the most prominent genre families as an organizing principle for the ELD standards.

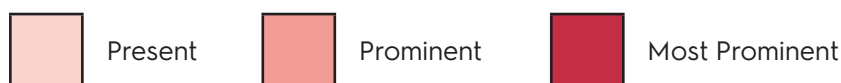
All Key Language Uses are present across all grade levels and disciplines, and yet at each grade-level cluster and discipline, some are more prominent than others.

The **most prominent Key Language Uses** identified in the analysis of academic content standards for Grades 4-5 are the **basis for its Language Expectations**. They are marked with an “x” in the dark red boxes of the chart below. The medium and light shades of red indicate lesser degrees of prominence of each Key Language Use.

Distribution of Most Prominent Key Language Uses in Grades 4-5 Across WIDA ELD Standards Statements

WIDA ELD Standard	Narrate	Inform	Explain	Argue
 1. Language for Social and Instructional Purposes	X		X	X
 2. Language for Language Arts	X	X		X
 3. Language for Mathematics			X	X
 4. Language for Science			X	X
 5. Language for Social Studies			X	X

Most Prominent Key Language Uses: Grades 4-5 Key




Learn more about each Key Language Use across the grades and disciplines in Section 4: Resources—Key Language Uses: A Closer Look.

GRADES 4-5 Language Expectation Summary Tables

Language Expectations, organized by prominent Key Language Uses, specify what students are expected to do with language to meet content expectations. These **Summary Tables** are a compilation of interpretive and expressive Language Expectations for Grades 4-5. Learn more about Language Expectations and Key Language Uses in the first section of this book.

- For an additional way of looking at K-12 Language Expectations by WIDA ELD Standard Statement corresponding to the core disciplines (Language Arts, Mathematics, Science, and Social Studies), see Appendix E: Meeting ESSA Requirements.
- For ideas on how to use Language Expectations in unit-level curricular design, see Section 4: Curricular Considerations

 WIDA ELD Standard 1 – English language learners communicate for SOCIAL AND INSTRUCTIONAL purposes within the school setting	
Interpretive Language Expectations Multilingual learners use language to...	Expressive Language Expectations Multilingual learners use language to...
ELD-SI.K-5.Inform.Interpretive: Interpret information about social and instructional topics, tasks, and situations by identifying its main ideas and details.	ELD-SI.K-5.Inform.Expressive: Share information for social and instructional purposes by identifying, classifying, describing, or comparing/contrasting ideas.
ELD-SI.K-5.Narrate.Interpretive: Interpret narratives about social and instructional topics, tasks, and situations by identifying their main ideas and details as well as following the development of story elements.	ELD-SI.K-5.Narrate.Expressive: Construct narratives for social and instructional purposes and to engage, inform, or entertain audiences.
ELD-SI.K-5.Explain.Interpretive: Interpret explanations about social and instructional topics, tasks, and situations by identifying how or why things are as they are.	ELD-SI.K-5.Explain.Expressive: Construct explanations for social and instructional purposes with statements connected to visuals, details, or data.
ELD-SI.K-5.Argue.Interpretive: Interpret arguments by identifying their perspective about social and instructional topics, tasks, and situations.	ELD-SI.K-5.Argue.Expressive: Construct arguments for social and instructional purposes to share opinions with supporting reasons.



WIDA ELD Standard 2 – English language learners communicate information, ideas and concepts necessary for academic success in the content area of **LANGUAGE ARTS**

Interpretive Language Expectations Multilingual learners use language to...	Expressive Language Expectations Multilingual learners use language to...
ELD-LA.4-5.Argue.Interpretive: Interpret arguments in Language Arts by evaluating the strength of their claims, evidence, and reasoning.	ELD-LA.4-5.Argue.Expressive: Construct strong organized arguments in Language Arts that introduce, support, and summarize an opinion or point of view.
ELD-LA.4-5.Inform.Interpretive: Interpret information in Language Arts by identifying its organization and details, as well as evaluating the clarity of its ideas and concepts.	ELD-LA.4-5.Inform.Expressive: Convey information in Language Arts by connecting main ideas and details of multiple ideas, concepts, or texts.
ELD-LA.4-5.Narrate.Interpretive: Interpret narratives in Language Arts to determine how their details or structure contribute to a theme or perspective.	ELD-LA.4-5.Narrate.Expressive: Construct organized and detailed narratives in Language Arts tailored to task, purpose, and audience.



WIDA ELD Standard 3 – English language learners communicate information, ideas and concepts necessary for academic success in the content area of **MATHEMATICS**

Interpretive Language Expectations Multilingual learners use language to...	Expressive Language Expectations Multilingual learners use language to...
ELD-MA.4-5.Argue.Interpretive: Interpret mathematical arguments by identifying misconceptions and critiquing the reasoning of others.	ELD-MA.4-5.Argue.Expressive: Construct mathematical arguments by making a conjecture or claim and specifying the conditions for which it is true using specialized disciplinary terminology.
ELD-MA.4-5.Explain.Interpretive: Interpret mathematical arguments by identifying misconceptions and critiquing the reasoning of others.	ELD-MA.4-5.Explain.Expressive: Construct mathematical explanations including sequential language and specific, technical, and abstract terminology.



WIDA ELD Standard 4 – English language learners communicate information, ideas and concepts necessary for academic success in the content area of **SCIENCE**

Interpretive Language Expectations Multilingual learners use language to...	Expressive Language Expectations Multilingual learners use language to...
ELD-SC.4-5.Argue.Interpretive: Interpret scientific arguments by identifying details related to ideas, concepts, claims, and evidence (data).	ELD-SC.4-5.Argue.Expressive: Construct cohesive arguments with strong claims and detailed descriptions of evidence (data).
ELD-SC.4-5.Explain.Interpretive: Interpret scientific explanations by identifying relationships among parts of systems or details of phenomena.	ELD-SC.4-5.Explain.Expressive: Construct organized and detailed scientific explanations of phenomena or systems.



WIDA ELD Standard 5 – English language learners communicate information, ideas and concepts necessary for academic success in the content area of **SOCIAL STUDIES**

Interpretive Language Expectations Multilingual learners use language to...	Expressive Language Expectations Multilingual learners use language to...
ELD-SS.4-5.Argue.Interpretive: Interpret Social Studies arguments by evaluating the cohesion among their claims, evidence, and reasoning.	ELD-SS.4-5.Argue.Expressive: Construct cohesive Social Studies arguments with connected claims, evidence, and reasoning while comparing and contrasting multiple perspectives.
ELD-SS.4-5.Explain.Interpretive: Interpret Social Studies explanations by identifying connections among causes, outcomes, or consequences of events, systems, or phenomena.	ELD-SS.4-5.Explain.Expressive: Construct Social Studies explanations that contextualize and state causes, outcomes, and consequences of events, systems, or phenomena.

GRADES 4-5 Language Expectations, Functions and Features

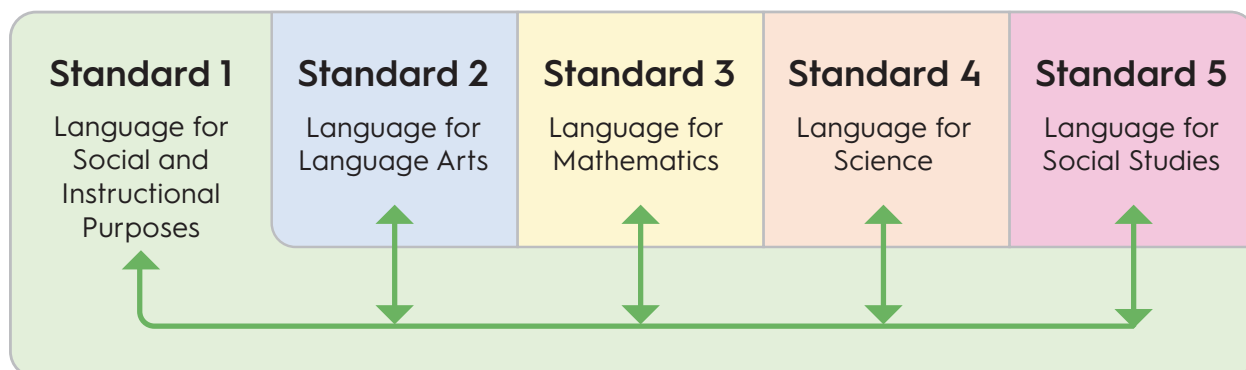
Language Expectations are goals for content-driven language instruction. Each Language Expectation for Grades 4-5 is presented here with **commonly associated Language Functions and Language Features**. These building blocks of language development help educators begin to unpack the Language Expectations.



WIDA ELD STANDARD 1



Social and Instructional Language

Language for Social and Instructional Purposes is connected to the language of WIDA's other four standards, as shown below, and applies across a range of educational contexts and language proficiency levels.



Language for Social and Instructional Purposes (WIDA ELD Standard 1) is broader in scope and applicability than the other four ELD standards that are associated with discipline-specific learning. Therefore, Language Expectations, Functions and Features for Standard 1 are presented in two grade-level clusters: K-5 and 6-12, whereas the other four WIDA ELD standards present Language Expectations, Functions, and Features according to each grade-level cluster (K, 1, 2-3, 4-5, 6-8, 9-12).

WIDA ELD Standard 1 – English language learners communicate for SOCIAL AND INSTRUCTIONAL purposes within the school setting		
Inform	ELD-SI.K-5.Inform.Interpretive: Interpret information about social and instructional topics, tasks, and situations by identifying its main ideas and details.	ELD-SI.K-5.Inform.Expressive: Share information for social and instructional purposes by identifying, classifying, describing, or comparing/contrasting ideas.
Narrate	ELD-SI.K-5.Narrate.Interpretive: Interpret narratives about social and instructional topics, tasks, and situations by identifying their main ideas and details as well as following the development of story elements.	ELD-SI.K-5.Narrate.Expressive: Construct narratives for social and instructional purposes and to engage, inform, or entertain audiences.

WIDA ELD Standard 1 – English language learners communicate for SOCIAL AND INSTRUCTIONAL purposes within the school setting		
	ELD-SI.K-5.Explain.Interpretive: Interpret explanations about social and instructional topics, tasks, and situations by identifying how or why things are as they are.	ELD-SI.K-5.Explain.Expressive: Construct explanations for social and instructional purposes with statements connected to visuals, details, or data.
	ELD-SI.K-5.Argue.Interpretive: Interpret arguments by identifying their perspective about social and instructional topics, tasks, and situations.	ELD-SI.K-5.Argue.Expressive: Construct arguments for social and instructional purposes to share opinions with supporting reasons.

Language Functions and Language Features

As they work toward meeting the Language Expectations, multilingual learners might...

Ask different types of questions related to a phenomenon/plot/problems/reasoning, through...

- Interrogatives including Wh- questions and Yes or No questions to:
 - recall (e.g., *What are the parts of a plant?*)
 - comprehend (e.g., *What happens to? Where does ... ?*)
 - apply (e.g., *How can you use this information?*)
 - analyze (*Is ... Are you sure.. Is it possible... ?*)
 - synthesize (e.g., *Based on the information we discussed, what can you say about...?*)
 - evaluate (e.g., *How important was the information provided?*)
- Declarative statements used as questions (e.g., *I wonder*)
- Everyday language to clarify (e.g., *How did you get that? Why did you draw that?*)

Give directions to tell someone how to do or make something, through...

- Doing verbs stated as imperatives (e.g., **line up** by the door, **follow** the directions, **take** a left, **listen** to the leader)
- Sequential language (e.g., *after, before adding*)
- Language of place (where), manner (how), and time (when) adds details, numerical information, to make precise meanings using everyday language (e.g., here's how you clean your desk: *take all the stuff **out of your desk**, put all the pencils **into your pencil bag***)

Make tentative claims, personal opinions, predictions, and suggestions, through...

- A variety of verbs (e.g., *I think, I wonder if, it appears to...*)
- Clauses communicating suggestions (e.g., *we should try ... It's likely/unlikely/possible that... it may/might/can/could be, It seems to...*)

Restate or summarize an idea, through...

- Saying verbs (e.g., *She said, He asked, They suggested...*)
- Clauses that summarize (e.g., *all this means is, they are all showing that ...*)

Question someone's idea, through...

- Interrogatives (e.g., *Why did you say that?*, *What's your evidence ... ? How did you get?*)
- Statements with causal language (e.g., *It won't work because*, *I think that's wrong because...*)

Compare and contrast ideas/objects/characters/solutions, through...

- Demonstrative pronouns (*this*, *those*, *that*)
- Comparative language (e.g., *similar to*, *different from*, *meaner*, *stronger*, *smarter*, *kinder*, *bigger*, *smaller*, *better than...*)

Make observations, describe and record them through...

- Verbs for observing (e.g., *notice*, *see*, *observe*)
- Clauses that introduce explanations and link to previously presented information
- Language adds details, numerical information, manner (how) and location (where) to make precise meanings (e.g., *the bar graph on the left shows that there is more...*)
- Noun groups with everyday language and specific technical terms (e.g., *LED light*, *battery*, *the positive side of the LED light*, *wire*, *aluminum foil*)

Recount sequence of steps/what was done in an experiment,, through...

- Information organized sequentially either through sequence language or through numbered steps
- Doing verbs to recount actions taken in past tense (e.g., *added*, *mixed*, *combined*)
- Noun groups using everyday language to create precise meanings (e.g., *four corners of the room*, *the whole thing*, *the lines that never cross*, *the lines that make an x*)
- Everyday language used with precision describe observable and unobservable features (e.g., *electricity needs a path to go through*)
- Diagrams, graphs, and pictures representations to show processes involved



WIDA ELD Standard 2 – English language learners communicate information, ideas and concepts necessary for academic success in the content area of **LANGUAGE ARTS**

ELD-LA.4-5.Inform.Interpretive: Interpret information in Language Arts by identifying its organization and details, as well as evaluating the clarity of its ideas and concepts.

ELD-LA.4-5.Inform.Expressive: Convey information in Language Arts by connecting main ideas and details of multiple ideas, concepts, or texts.

Language Functions and Language Features

As they work toward meeting the Language Expectations, multilingual learners might...

Organize and connect ideas in text in ways that support its purpose (give generalized information about entity or an entire class of things e.g., *types of solar energy*), through...

- Lexical cohesion created through repetition, class/subclass, type/subtype, whole/part relationships
- Topic repeated as starting point of sentences or paragraph
- Expanded noun groups that add detail to the concept or entity (e.g., *a **spherical** ball of rock or gas*), classifiers (e.g., ***greenhouse** gases*)

Construct definitions of key concepts in research reports, through...

- Nominalizations that represent abstract concepts (e.g., *Leatherbacks are declining = this decline in population.*)
- Declarative statements with relating verbs to define, describe, classify (e.g., *The only major breeding site of the Kemp's ridley is on a small strip of beach at Rancho Nuevo, Mexico.*)

Establish an objective or neutral stance in research reports, through...

- Limited use of personal pronouns
- Use of nouns that tell you class of things (e.g., *marine life v. dolphins, sea turtles*)
- Integration of diagrams, tables, graphics to illustrate data
- Neutral/objective voice of authority with declarative statements without evaluative language (e.g., *this increase v. this **drastic** increase*).

Provide details about attributes, qualities, characteristics about the entity, through...

- Quantity, factual, classifying adjectives to add specificity about the entity (e.g., *The Masirah Island's annual nesting population is....*)
- Language of time, place, and manner to add details about the entity (e.g., *every year, at the Rancho Nuevo, Mexico, rapidly*)

Produce a summary of key ideas for a research report and link them, through...

- Reference devices (*pronouns, synonyms, renaming devices*)
- Ellipsis and substitution that reduce repetition and redundancy with a cluster of sentences
- Nominalizations that condense information from previous sentences to build cohesion (e.g., *it rained year after year = annual floods*)



WIDA ELD Standard 2 – English language learners communicate information, ideas and concepts necessary for academic success in the content area of **LANGUAGE ARTS**

ELD-LA.4-5.Narrate.Interpretive: Interpret narratives in Language Arts to determine how their details or structure contribute to a theme or perspective.

ELD-LA.4-5.Narrate.Expressive: Construct organized and detailed narratives in Language Arts tailored to task, purpose, and audience.

Language Functions and Language Features

As they work toward meeting the Language Expectations, multilingual learners might...

Orient the reader/listener to the narrative text type (*stories or histories*), through...

- Expanded noun groups and verb groups that introduce characters, real or imagined
- Language of place/time that describes and/or defines context and setting (e.g., *in the summer*) and time (e.g., *before school started*)
- Doing and saying verbs that set up characters
- Feeling and thinking verbs that describe what is going on in the writer's head

Develop and describe characters and relationships among them, through...

- Verb groups that describe characters' behaviors and inner worlds (e.g., doing verbs [*raced*], thinking verbs [*believed, was wondering*], feeling verbs [*loved, hoping, longed for*], saying verbs [*screamed, sobbed, mumbled*])
- Noun groups that add description and detail

Develop the narrative with complications, time sequences, event sequences, resolutions to build a coherent story or account, through...

- Variety of sentence types including dialogue
- Connectors that combine and link text details and events (*and, but, so, yet, or*), signal time (*first, next, and then*), and sequence events (*first, second, lastly, after that, before, at night*)
- Cohesive devices used to create continuity and flow (repetition, pronouns [*I, he, she, theirs*], demonstratives [*this, that, those*], synonyms)

Engage the audience, through...

- Evaluative language describes author's attitudes through the use of adjectives (e.g., *awesome, scared, mean, enjoyed the time, most people*)
- Literary devices (e.g., *simile, personification, alliteration, sensory words/phrases*) convey images that enrich the narrative



WIDA ELD Standard 2 – English language learners communicate information, ideas and concepts necessary for academic success in the content area of **LANGUAGE ARTS**

ELD-LA.4-5.Argue.Interpretive: Interpret arguments in Language Arts by evaluating the strength of their claims, evidence, and reasoning.

ELD-LA.4-5.Argue.Expressive: Construct strong organized arguments in Language Arts that introduce, support, and summarize an opinion or point of view.

Language Functions and Language Features

As they work toward meeting the Language Expectations, multilingual learners might...

Orient reader/listener to the topic/issue/purpose of persuasion (persuade, evaluate book/character, interpret theme, critique, challenge), through...

- Expanded noun groups that provide detail about the issue/book (e.g., *The Proudest Blue, a book written by...*)
- Background information that supports audience
- Clauses that provide detail about characters/issue (e.g., *there is a cat that is robbing banks then getting caught by a dog*)

Select relevant ideas and details that support claims with valid and reliable evidence from multiple sources, through...

- Clauses adding details, examples, quotes, data (e.g., *It tells us even through dark times, they still stuck to their culture*)
- Expanded noun and verb groups adding detail
- Connectors that signal additional examples of elaboration of an idea (e.g., *so, and, sometimes*)

Establish perspective/ Identify bias, through...

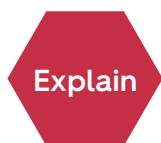
- First person (*personal point of view*) or third person (*neutral/logical stance*)
- Authoritative declarative sentences that evaluate and interpret events (e.g., *In the book, The Proudest Blue, the author teaches us to be proud of our culture*)
- Simple evaluative adjectives and adverbs (e.g., *beautiful, amazing, unfortunately*)

Show relationships (condition, concession) between claims, counterclaims, multiple perspectives, evidence, and reasoning, through...

- Connectors linking claims with evidence and reasoning (e.g., *because, but, as a result, when, if, although, therefore*)
- Clauses providing explanations that link claim with evidence (e.g., *This shows that the theme is...*)

Organize and connect ideas in ways that support the purpose of the argument, through...

- Reference devices (e.g., *pronouns, synonyms, renaming subject*) create cohesion)
- Connectors that sequence the points in the argument (e.g., *first, second, lastly*)



WIDA ELD Standard 3 – English language learners communicate information, ideas and concepts necessary for academic success in the content area of **MATHEMATICS**

ELD-MA.4-5.Explain.Interpretive: Interpret mathematical explanations by identifying how solutions and justifications are connected.

ELD-MA.4-5.Explain.Expressive: Construct mathematical explanations including sequential language and specific, technical, and abstract terminology.

Language Functions and Language Features

As they work toward meeting the Language Expectations, multilingual learners might...

Orient reader/listener to the phenomena being explained or analyzed, through...

- First person pronoun (e.g., *we*)
- Doing verbs in the past tense (e.g., *asked*, *multiplied*) to describe what was done

Describe a mathematical concept or entity, through...

- Expanded noun groups and technical terms (e.g., *the mean of everyone's heights*)
- Use of nominalization to explain mathematical processes (e.g., *calculation*)
- Clause structures to express conditional relationships (e.g., *if the shape has 4 sides then it is a quadrilateral*)

Interpret and describe data/and or steps to solve a problem, through...

- Visual data displays (*charts*, *graphs*) with titles, units and labels
- Past tense doing verbs specialized for math (e.g., *added*, *subtracted*)
- Reasoning expressed through causal language (e.g., *We added the two numbers together because...*)

Evaluate results/ Discuss findings, through...

- Language choices to reflect on process (e.g., *If I revise my answer; we should have done this*)
- Clauses that connect comments to an explanation of thinking (e.g., *This answer is correct because*)

Organize and connect ideas in ways that support the purpose of the text, through...

- Connectors that express logical relationships (e.g., *because*, *and*)
- Connectors and prepositional phrases that order steps/procedures (e.g., *first*, *next*)
- Reference devices (*personal and demonstrative pronouns*, *articles*, *text reference*) that create cohesion

Justify your answer, through...

- Increasingly technical math noun groups (e.g., *rational number coefficient*)
- Clauses with causal language (e.g., *the relationship is not a function **because** a function is...*)



WIDA ELD Standard 3 – English language learners communicate information, ideas and concepts necessary for academic success in the content area of **MATHEMATICS**

ELD-MA.4-5.Argue.Interpretive: Interpret mathematical explanations by identifying how solutions and justifications are connected.

ELD-MA.4-5.Argue.Expressive: Construct mathematical arguments by making a conjecture or claim and specifying the conditions for which it is true using specialized disciplinary terminology.

Language Functions and Language Features

As they work toward meeting the Language Expectations, multilingual learners might...

Conjecture (Make a claim [always, sometimes, never true]), through...

- Comparative language (e.g., *4/10 is greater than 3/8 because it is a smaller fraction (1/10) less than 1/2*)
- Precise language to specify the domain for which they believe their conjecture is true. (e.g., *For all positive numbers...*)

Generalize by finding commonalities across cases, through...

- Noun groups (e.g., *All rectangles have two sets of parallel lines*)
- Conditional clauses (when or if) to extend beyond the original range (e.g., *When you multiply by 10 or any multiple of 10...*)

Justify your answer by providing evidence and mathematical facts (explaining why a generalization is true or false), through...

- Causal language to convince others of the validity of your argument (e.g., *It will always work that way because..., If you draw both pictures, you can see...*)

Make a logical argument by using already-understood ideas and underlying relationships, through...

- Increasingly technical math noun groups (e.g., *All squares have four equal side lengths, unit fractions*)
- Causal language (e.g., *1/4 is not the same as 2/6 because...*)

Evaluate the arguments of others (critique), through...

- A variety of questions to critique reasoning (e.g., *How did you find your answer?; How do you know that your result is correct?*)
- A variety of sentences to show agreement or disagreement (e.g., *I disagree; My answer was different than yours*)
- Causal language to identify misconceptions (e.g., *You do not need common denominators to multiply fractions because...*)



WIDA ELD Standard 4 – English language learners communicate information, ideas and concepts necessary for academic success in the content area of **SCIENCE**

ELD-SC.4-5.Explain.Interpretive: Interpret scientific explanations by identifying relationships among parts of systems or details of phenomena.

ELD-SC.4-5.Explain.Expressive: Construct organized and detailed scientific explanations of phenomena or systems.

Language Functions and Language Features

As they work toward meeting the Language Expectations, multilingual learners might...

Describe observations of a phenomenon or data gathered about a phenomenon, through...

- Defining phenomenon using various strategies
- Relating verb groups that state relationships or attributes (e.g., *have, be, belong to*)
- Diagrams, graphics, data, statistics that add information or illustrate content

Define science ideas and concepts that help to explain how or why a phenomenon occurs, through...

- Nominalizations that represent abstract concepts (e.g., *effects, condensation*)
- Technical terms (e.g., *antioxidants, contaminant*)
- Connectors that link clauses to combine ideas into logical relationships (e.g., *so, because, and then*)
- Variety of clause types that express causality (e.g., *Evaporation is caused by water turning into a gas or vapor*)

Identify bias/perspective in how scientific results are communicated about an observed phenomenon, through...

- Passive voice that fosters an objective stance (e.g., *ocean water is heated by the sun*)
- First person avoided to construct scientific authority, may refer to self and audience to establish shared interest in a topic (e.g., *The water in our lakes today comes from different sources*)
- Declarative statements that construct facts (e.g., *waves are regular patterns of motion*)

Adjust language for different audiences, through...

- Language resources for hedging (e.g., *certainly, usually, could/may/might*)
- Evaluative language (e.g., *most important, probably*) to soften knowledge claims and to show deference to experts

Organize and connect ideas in ways that support the explanation, through...

- Reference devices at the beginning of sentences that build information logically (e.g., *pronouns, synonyms, renaming subject*)
- Cause/effect relationships expressed through given (*previously stated*) and new (*added details, examples*) information, often making use of nominalization (e.g., *Most of the water vapor comes from oceans evaporating, but ice and snow evaporate too. Evaporation from snow and ice is called sublimation.*)



WIDA ELD Standard 4 – English language learners communicate information, ideas and concepts necessary for academic success in the content area of **SCIENCE**

ELD-SC.4-5.Argue.Interpretive: Interpret scientific arguments by identifying details related to ideas, concepts, claims, and evidence (data).

ELD-SC.4-5.Argue.Expressive: Construct cohesive arguments with strong claims and detailed descriptions of evidence (data).

Language Functions and Language Features

As they work toward meeting the Language Expectations, multilingual learners might...

Orient the reader/listener to the topic of the argument, through...

- Phenomenon defined using various strategies
- Background information to support audience
- Diagrams, graphics, data, statistics add information

Select and use relevant information in a text, model or data to support a scientific argument, through...

- Expanded noun groups that classify and/or add detail (e.g., *cretaceous extinction*)
- Causal language that describes evidence (e.g., *Based in part on the gaping size of the depression, scientists estimated the size of the impact*)

Signal logical relationships between claim, evidence, and reasoning, through...

- Connectors that link clauses to combine ideas into logical relationships (e.g., *as a result, therefore*)
- Clauses that provide explanations that link claim with evidence and reasoning (e.g., *One example of evidence that supports my claim is...*)

Establish perspective/Identify bias, through...

- Passive voice that keeps emphasis on main topic rather than who or what is doing the action (e.g., *The planet was chilled*)
- Authoritative declarative sentences that evaluate and interpret events (e.g., *At the impact site an asteroid crashed into the Earth's surface*)

Organize and connect ideas in ways that support the purpose of text, through...

- Connectors that link sentences and longer stretches of text signaling details of time (*next, at the same time*), causality (*therefore, consequently, as a result*), clarification (*for example, as seen in the model*), etc.
- Reference devices (*pronouns, synonyms, renaming subject*) that create cohesion
- Nominalizations that condense information from previous sentences to build cohesion (e.g., *Growing evidence points to a supervolcanic accomplice. Eruptions in what is now India.*)



WIDA ELD Standard 5 – English language learners communicate information, ideas and concepts necessary for academic success in the content area of **SOCIAL STUDIES**

ELD-SS.4-5.Explain.Interpretive: Interpret Social Studies explanations by identifying connections among causes, outcomes, or consequences of events, systems, or phenomena.

ELD-SS.4-5.Explain.Expressive: Construct Social Studies explanations that contextualize and state causes, outcomes, and consequences of events, systems, or phenomena.

Language Functions and Language Features

As they work toward meeting the Language Expectations, multilingual learners might...

Orient reader/listener to the phenomenon or historical event being explained, through...

- Prepositional phrases of time and place that contextualize phenomena or event
- Relating verbs (*is, are*) that define phenomena or event (e.g., *Identity is who you are*)

Organize and connect ideas in ways that support the purpose of the text, through...

- Connectors that sequence factors and examples (e.g., *the first factor, the second*)
- Causal connectors that combine ideas into logical relationships (e.g., *as a result, therefore*)
- Starting points of sentences establish cohesion through repetition, substitution and pronoun referencing

Set a context for understanding the outcome and the factors, through...

- Declarative statements with little evaluation provide detail on who, where, when (e.g., *They made maple syrup.*)
- Action verbs in past tense that describe events (*fished, hunted, made*)

Relate the factors that contribute to a particular outcome, (e.g., *what are the factors that led to the Native American nations losing their language?*), through...

- Single nouns (e.g., *effects, factors*) and nominalization that represent abstract concepts (e.g., *assimilation, identity, termination*)
- Clause structures that express causal relationships between events (e.g., *Without their forests, they couldn't be themselves.*)
- Evaluative language (e.g., *the major cause is; made worse by*)

Identify the outcomes or consequences of a phenomenon (e.g., *what effects did assimilation have on the Native Americans?*), through...

- Causal language (e.g., *that caused*)
- Relative clauses that provide elaboration of examples (e.g., *which destroyed more of the forest*)

Establish perspective/Identify bias, through...

- Authoritative declarative statements that evaluate and interpret events (e.g., *The US government took the children and sent them to boarding schools*)
- Verbs (e.g., *tried to make, took*) and adjectives (e.g., *bad*) that judge behavior or moral character
- Action verbs that construct agency and make who did what to whom transparent



WIDA ELD Standard 5 – English language learners communicate information, ideas and concepts necessary for academic success in the content area of **SOCIAL STUDIES**

ELD-SS.4-5.Argue.Interpretive: Interpret Social Studies arguments by evaluating the cohesion among their claims, evidence, and reasoning.

ELD-SS.4-5.Argue.Expressive: Construct cohesive Social Studies arguments with connected claims, evidence, and reasoning while comparing and contrasting multiple perspectives.

Language Functions and Language Features

As they work toward meeting the Language Expectations, multilingual learners might...

Orient reader/listener to the issue and purpose of argument (argue in favor or against a position, present a balanced interpretation, challenge perspective), through...

- Background information that supports audience
- Expanded noun groups that provide detail about the issue with relative clauses (e.g., *The Ho-Chunk, an Indigeonous Nation in Wisconsin*)

Select relevant ideas and details that support claims with valid and reliable evidence from multiple sources, through...

- Clauses adding details, examples, quotes, data (e.g., *In the book, it says, the author tells us*)
- Language of time place, manner and what happened
- Doing verbs (e.g., *offered, killed, left*) that construct agency and make who did what to whom transparent

Show relationships (condition, concession) between claims, counterclaims, multiple perspectives, evidence, and reasoning, through...

- Connectors that link claims with evidence and reasoning (e.g., *because, so, and*)
- Connectors that signal alternate points of view (*one way, another way, on the other hand*)
- Connectors that show concession or comparison/contrast (e.g., *if, unless, however*)

Establish perspective, through...

- Passive voice that keeps emphasis on main topic rather than who or what is doing the action (e.g., *the people were forced off their land*)
- Authoritative declarative sentences that evaluate and interpret events (e.g., *Women did most of this farming and things dealing with land. Men hunted and fished.*)
- Evaluative verbs, adverbs, and adjectives (e.g., *forced, lonely, worst*)

Organize and connect ideas in ways that support the purpose of the argument, through...

- Reference devices that create cohesion (e.g., *pronouns, synonyms, renaming subject*)
- Connectors that sequence paragraphs (e.g., *first, second, in conclusion*)



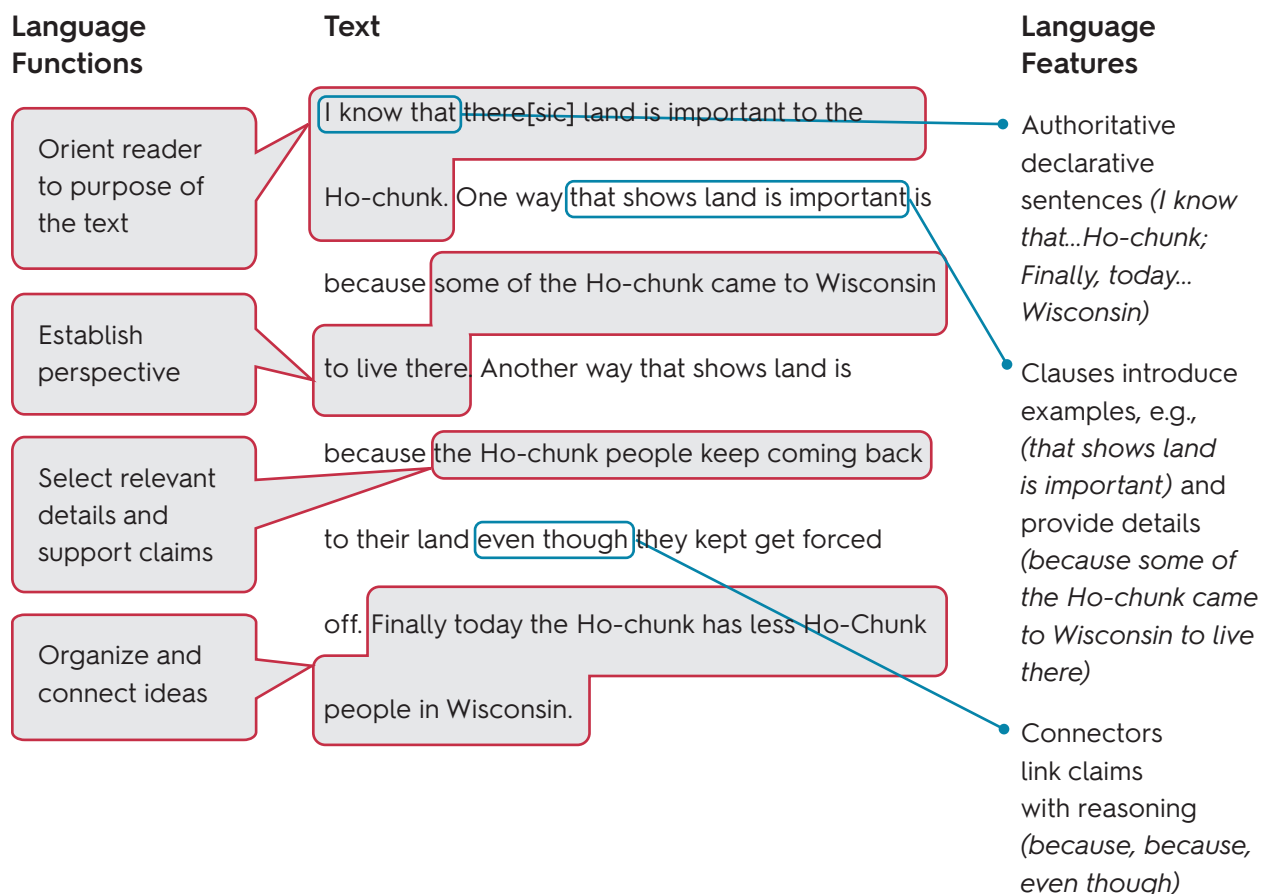
WIDA ELD STANDARD 5: Language for Social Studies Annotated Language Sample*

Expressive Language Expectation: Multilingual learners use language to....

ELD-SS.4-5.Argue.Expressive: Construct cohesive Social Studies arguments with connected claims, evidence, and reasoning while comparing and contrasting multiple perspectives.

Context: This text was written by a multilingual 4th grader in Wisconsin. As part of a Lucy Calkin's writing Unit of Study called "Bringing History to Life Unit" the class was learning how to write Non-Fiction Books on indigenous peoples of Wisconsin. As part of this unit, the students learned how to write informational, narrative, and argument texts. The class spent many days discussing the time period when indigenous people were forcibly removed from their lands. This text here is about the Ho-Chunk Nation.

Credit: Sharon Besser and Ruslana Westerlund (WIDA)



* content and layout not final

The WIDA Proficiency Level Descriptors outline an interlocking set of criteria to use when measuring multilingual learner language performance in activities that target the WIDA Language Expectations. Each language proficiency level is cumulative, building on previous levels (e.g., PL 4 = PL1 + PL 2 + PL3 + PL4).

Dimension	End of Level 1 Entering	End of Level 2 Emerging	End of Level 3 Developing	End of Level 4 Expanding	End of Level 5 Bridging	Level 6 Reaching
	As multilingual learners near the END of each proficiency level, and with appropriate scaffolding and multimodal communication, they will make meaning by processing:					
Discourse Organization of language	Text that conveys a wide range of common social purposes or instructional routines	Text that conveys a clearly signaled purpose; with relationships explicitly arranged in a short, sequence (with a few details)	Text that conveys a clearly signaled purpose; with relationships arranged in an extended sequence	Text that conveys a purpose and clearly signaled perspective; with relationships arranged into extended, detailed sequences	Text that conveys a purpose and clearly signaled perspective; with relationships arranged in increasingly extended sequences	Text that conveys several, integrated purposes and perspectives; with relationships arranged in long, elaborated sequences
	Ideas linked by closely associated words; basic connectors	Ideas linked by pronoun substitution; contrasting connections	Ideas linked by an umbrella (superordinate) term; common comparative connectors (while, on the other hand)	Ideas linked by an increasing range of adding, contrasting, causal and conceding connectors	Relationships among ideas signaled by an increasing range of cohesive devices	Ideas that have been condensed and collapsed into abstract themes and concepts using an increasing range of cohesive devices
Density of language	Important information found in simple noun group with an adjective group added before noun	Important information found in expanded noun groups with adjectives and adverbs added before or after nouns	Important information found in expanded noun groups with relative clauses added after nouns	Important information conveyed concisely in expanded noun groups	Important information found in expanded noun groups; increasing complexity of modifiers added before or after nouns	Important information compacted into abstract nouns (nominalizations)
Amount of language	Short, predictable sentences	A series of sentences	Short, connected discourse	Short, connected discourse with an increasing variety of sentences	Longer stretches of connected discourse with multiple, varied sentences	An increasing variety of expanded or concise discourse
Sentence Grammatical complexity of language	Simple sentences	Complex sentences beginning with a dependent clause	Complex sentences with passive structures	Complex sentences with a relative clause that contains an infinitive	Complex sentences with passives clauses that use infinitives	Complex sentences with few (or no) conjunctions due to use of ellipsis or nominalization
Word/Phrase Precision of language	A narrow range of everyday, general, and disciplinary language in concrete, immediate contexts	An increasing range of everyday and general language, including simple contrasting pairs of words	A wide range of everyday and general language, including words and phrases with a common schema	A narrow range of disciplinary language, including multiple meanings	An increasing range of disciplinary language, including an increasing range of specialized terminology; adverbials, adjectives showing different degrees of possibility	A wide range of disciplinary language, including an increasing range of technical terms and idiomatic expressions

Expressive Communication Modes

WIDA Proficiency Level Descriptors for Speaking, Writing, and Representing

Dimension	End of Level 1 Entering	End of Level 2 Emerging	End of Level 3 Developing	End of Level 4 Expanding	End of Level 5 Bridging	Level 6 Reaching
	As multilingual learners near the END of each proficiency level, and with appropriate scaffolding and multimodal communication, they will make meaning by processing:					
Discourse Organization of language	Text that conveys a narrow range of common social purposes or instructional routines	Text that conveys an increasing range of common social purposes or instructional routines	Text that more consistently conveys a clearly signaled purpose; with relationships arranged in a short sequence	Text that more consistently conveys a clearly signaled purpose; with relationships extended into a longer sequence	Text that consistently conveys a purpose and clearly signaled perspective; with relationships arranged into extended, detailed sequences	Text that consistently conveys several, integrated purposes and perspectives; with relationships appropriately arranged in long, elaborated sequences
Cohesion of language	Ideas linked by simple demonstratives (this, that)	Ideas linked by repeated words	Ideas linked by sequencing connectors	Ideas linked by pronoun substitution; contrasting connectors	Ideas linked by an increasing range of adding, contrasting, causal, and conceding connectors	Relationships among ideas signaled by an increasing range of cohesive devices
Density of language	Explicitly signaled information found in simple noun group with articles (the, a)	Important information easily found in simple noun group with possessive adjective added before noun	Information easily found in simple noun group; prepositional phrase added after noun	Information easily found in simple noun group; adjectives added before or after noun	Important information found in expanded noun groups with relative clauses added after nouns	Important information found in expanded noun groups; increasing complexity of modifiers added before or after nouns
Amount of language	Emerging expression	Word/phrases and clauses	One-to-two complete sentences	An increasing variety of short sentences	Multiple series of parallel sentences	Short, connected discourse
Sentence Grammatical complexity of language	Isolated or memorized chunks of language or simple phrasal patterns; no control	Simple phrasal patterns; limited control	Simple sentences with adverbs; occasional control	Simple sentences with two-word verbs; occasional control	Complex sentences with passive structures	Complex sentences beginning with a dependent clause
Word/Phrase Precision of language	High frequency everyday, general, and disciplinary language in concrete, immediate contexts	A narrow range of everyday and general language in concrete, immediate contexts	An increasing range of general language, including an additional meaning [to everyday language]	A wider range of general language, including collocations [<i>commonly paired words</i>] and cognates	A narrow range of disciplinary language including multiple meanings	An increasing range of disciplinary language, including an increasing range of specialized terminology; adverbials, adjectives showing different degrees of possibility

A close-up photograph of two young women, one of Asian descent and one of African descent, sitting at a desk and looking down at a book or paper. The woman on the left is holding a green pen. They both appear to be smiling and engaged in their work. The background is softly blurred, showing a bright indoor setting.

GRADES
9-12

**WIDA English Language
Development Standards**

- WIDA ELD Standards, Language Expectations, Functions, and Features
- Annotated Language Samples
- Proficiency Level Descriptors

GRADES 9-12 Introduction

Multilingual learners bring knowledge of the world, along with multiple languages and cultural insights, to high-school classrooms. Their values, experiences, and socioemotional development are foundations for formulating perspectives in the exploration of complex new ideas. The incorporation of multilingual learners' identities and backgrounds in meaningful topics that have applicability to their lives and the real world prompts their engagement in disciplinary practices as critical thinkers who develop deep understandings, evaluate information and attitudes, make choices, and effect change. The course of studies that multilingual learners take in high school plays a critical role in their transition to college success or entrance into satisfying careers. Such coursework, including advanced classes, should be delivered through an asset-based lens. Multilingual learners must have access to meaningful, rigorous coursework and programs that maximize their language development within and across disciplines.

In Grades 9-12 materials you will see:

- **WIDA ELD Standards Statements** – Language for Social and Instructional Purposes, Language for Language Arts, Language for mathematics, Language for Science, and Language for Social Studies – provide broad conceptual framing of language and content integration.
- **Key Language Uses (KLUs)** – Inform, Narrate, Explain, Argue – select genre families summarizing the most prominent language uses across disciplines.
 - **Distribution Charts for KLUs** – the most prominent KLUs in a given grade-level cluster.
- **Language Expectations** – goals for content-driven language instruction.
 - **Summary Table** – a compilation of interpretive and expressive Language Expectations.
 - **Language Functions** – purposes for language use that allow students to work toward meeting Language Expectations.
 - **Language Features** – linguistic structures that help shape the Language Functions.
 - **Annotated Language Samples** – exemplars that show the Language Expectations, Functions, and Features contextualized in authentic grade-level texts.
- **Proficiency Level Descriptors** – descriptions of how multilingual learners' linguistic repertoires expand across six levels of English language proficiency.

Most Prominent Key Language Uses for Grades 9-12






Key Language Uses come from a review of the literature and systematic analysis of the language demands of academic content standards. They represent the most prominent genre families in academic content standards.

It is essential to understand that the emphasis placed on these four Key Language Uses is not intended to restrict curriculum and instruction, but to highlight the most prominent genre families as an organizing principle for the ELD standards.

All Key Language Uses are present across all grade levels and disciplines, and yet at each grade-level cluster and discipline, some are more prominent than others.

The **most prominent Key Language Uses** identified in the analysis of academic content standards for Grades 9-12 are the **basis for its Language Expectations**. They are marked with an “x” in the dark orange boxes of the chart below. The medium and light shades of orange indicate lesser degrees of prominence of each Key Language Use.

Distribution of Most Prominent Key Language Uses in Grades 9-12 Across WIDA ELD Standards Statements

WIDA ELD Standard	Narrate	Inform	Explain	Argue
 1. Language for Social and Instructional Purposes	X	X	X	X
 2. Language for Language Arts	X	X		X
 3. Language for Mathematics			X	X
 4. Language for Science			X	X
 5. Language for Social Studies			X	X

Most Prominent Key Language Uses: Grades 9-12 Key



Present



Prominent



Most Prominent

Learn more about each Key Language Use across the grades and disciplines in Section 4: Resources—Key Language Uses: A Closer Look.


GRADES 9-12

Language Expectation Summary Tables

Language Expectations, organized by prominent Key Language Uses, specify what students are expected to do with language to meet content expectations. These

Summary Tables are a compilation of interpretive and expressive Language Expectations for Grades 9-12. Learn more about Language Expectations and Key Language Uses in the first section of this book.

- For an additional way of looking at K-12 Language Expectations by WIDA ELD Standard Statement corresponding to the core disciplines (Language Arts, Mathematics, Science, and Social Studies), see Appendix E: Meeting ESSA Requirements.
- For ideas on how to use Language Expectations in unit-level curricular design, see Section 4: Curricular Considerations

 WIDA ELD Standard 1 – English language learners communicate for SOCIAL AND INSTRUCTIONAL purposes within the school setting	
Interpretive Language Expectations Multilingual learners use language to...	Expressive Language Expectations Multilingual learners use language to...
ELD-SI.6-12.Inform.Receptive: Interpret information about social and instructional topics and tasks by identifying its purpose, organization, and relationships among ideas.	ELD-SI.6-12.Inform.Expressive: Share information for social and instructional purposes by identifying, classifying, describing, or comparing/contrasting ideas.
ELD-SI.6-12.Narrate.Receptive: Interpret narratives about social and instructional topics, tasks, and situations by identifying their perspective, purposeful organization, and style.	ELD-SI.6-12.Narrate.Expressive: Construct narratives for social and instructional purposes with clear relationships among events, developed characters, and style to engage the audience.
ELD-SI.6-12.Explain.Receptive: Interpret explanations about social and instructional topics and tasks by evaluating the clarity of their purpose and connections among ideas.	ELD-SI.6-12.Explain.Expressive: Construct explanations that contextualize and detail causes, outcomes, and consequences of social and instructional topics, tasks, and situations.
ELD-SI.6-12.Argue.Receptive: Interpret arguments about social and instructional topics, tasks, and situations by identifying perspective and evaluating the cohesion of their claims, evidence, and reasoning.	ELD-SI.6-12.Argue.Expressive: Construct arguments for social and instructional purposes with clear claims, evidence, and reasoning.



WIDA ELD Standard 2 – English language learners communicate information, ideas and concepts necessary for academic success in the content area of **LANGUAGE ARTS**

Interpretive Language Expectations Multilingual learners use language to...	Expressive Language Expectations Multilingual learners use language to...
ELD-LA.9-12.Inform.Interpretive: Interpret information in Language Arts by analyzing its purpose and development of relationships among ideas, people, or events within complex disciplinary topics.	ELD-LA.9-12.Inform.Expressive: Convey information in Language Arts with an objective voice of authority using style, structures, and complexity tailored to audience.
ELD-LA.9-12.Narrate.Interpretive: Interpret narratives in Language Arts by identifying how their development, organization, and style choices evolve, vary, and create impact.	ELD-LA.9-12.Narrate.Expressive: Construct narratives in Language Arts using intentional sequencing and sophisticated techniques to develop themes and engage the audience.
ELD-LA.9-12.Argue.Interpretive: Interpret arguments in Language Arts by identifying their perspective and evaluating the cohesion of their claims, counterclaims, evidence, and reasoning.	ELD-LA.9-12.Argue.Expressive: Construct cohesive arguments in Language Arts tailored to perspective, audience, task, and purpose.



WIDA ELD Standard 3 – English language learners communicate information, ideas and concepts necessary for academic success in the content area of **MATHEMATICS**

Interpretive Language Expectations Multilingual learners use language to...	Expressive Language Expectations Multilingual learners use language to...
ELD-MA.9-12.Argue.Interpretive: Interpret mathematical arguments by following and evaluating the coherence of their line of reasoning.	ELD-MA.9-12.Argue.Expressive: Construct mathematical arguments with cohesive logic, evidence, technical details, and acknowledgment of constraints.
ELD-MA.9-12.Explain.Interpretive: Interpret mathematical explanations by evaluating the clarity of logical, causal connections among ideas and identifying the technical details of the steps taken to solve a problem or justify its solution.	ELD-MA.9-12.Explain.Expressive: Construct mathematical explanations that convey technical details, procedural steps, logical organization, and clear relationships among ideas.



WIDA ELD Standard 4 – English language learners communicate information, ideas and concepts necessary for academic success in the content area of **SCIENCE**

Interpretive Language Expectations Multilingual learners use language to...	Expressive Language Expectations Multilingual learners use language to...
ELD-SC.9-12.Argue.Interpretive: Interpret scientific arguments by identifying technical details and examples of formal scientific voice, as well as evaluating the cohesion among their claims and evidence (data).	ELD-SC.9-12.Argue.Expressive: Construct formalized and cohesive scientific arguments with strong claims, detailed technical descriptions of evidence (data), and nuanced analysis of how evidence supports or refutes a claim.
ELD-SC.9-12.Explain.Interpretive: Interpret scientific explanations by analyzing perspective and the organization of their ideas, concepts, and technical details about phenomena.	ELD-SC.9-12.Explain.Expressive: Construct complex scientific explanations that convey a perspective of authority linking parts of systems or factors, outcomes, and consequences of phenomena with support from logic and data.



WIDA ELD Standard 5 – English language learners communicate information, ideas and concepts necessary for academic success in the content area of **SOCIAL STUDIES**

Interpretive Language Expectations Multilingual learners use language to...	Expressive Language Expectations Multilingual learners use language to...
ELD-SS.9-12.Argue.Interpretive: Interpret Social Studies arguments by identifying perspective and evaluating the cohesion among their claims, counterclaims, evidence, and reasoning.	ELD-SS.9-12.Argue.Expressive: Construct cohesive Social Studies arguments tailored to perspective, audience, task, and purpose.
ELD-SS.9-12.Explain.Interpretive: Interpret Social Studies explanations by analyzing the clarity of relationships among causes, outcomes, or consequences of events, systems or phenomena.	ELD-SS.9-12.Explain.Expressive: Construct Social Studies explanations that convey a perspective of authority on events, systems or phenomena with purposeful organization and clear relationships among carefully contextualized ideas.

GRADES 9-12 Language Expectations, Functions and Features

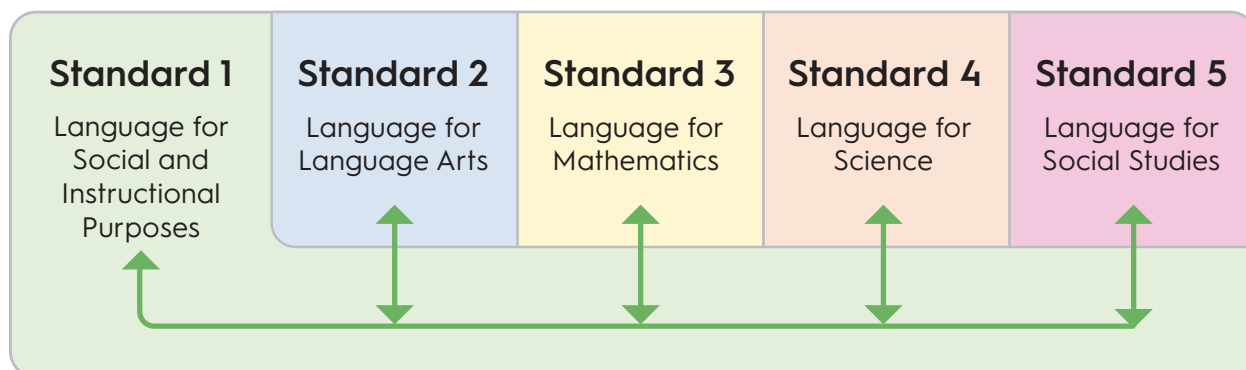
Language Expectations are goals for content-driven language instruction. Each Language Expectation for Grades 9-12 is presented here with **commonly associated Language Functions and Language Features**. These building blocks of language development help educators begin to unpack the Language Expectations.



WIDA ELD STANDARD 1



Social and Instructional Language

Language for Social and Instructional Purposes is connected to the language of WIDA's other four standards, as shown below, and applies across a range of educational contexts and language proficiency levels.



Language for Social and Instructional Purposes (WIDA ELD Standard 1) is broader in scope and applicability than the other four ELD standards that are associated with discipline-specific learning. Therefore, Language Expectations, Functions and Features for Standard 1 are presented in two grade-level clusters: K-5 and 6-12, whereas the other four WIDA ELD standards present Language Expectations, Functions, and Features according to each grade-level cluster (K, 1, 2-3, 4-5, 6-8, 9-12).

WIDA ELD Standard 1 – English language learners communicate for SOCIAL AND INSTRUCTIONAL purposes within the school setting		
Inform	ELD-SI.6-12.Inform.Receptive: Interpret information about social and instructional topics and tasks by identifying its purpose, organization, and relationships among ideas.	ELD-SI 6-12.Inform.Expressive: Share information for social and instructional purposes by identifying, classifying, describing, or comparing/contrasting ideas.
Narrate	ELD-SI.6-12.Narrate.Receptive: Interpret narratives about social and instructional topics, tasks, and situations by identifying their perspective, purposeful organization, and style.	ELD-SI.6-12.Narrate.Expressive: Construct narratives for social and instructional purposes with clear relationships among events, developed characters, and style to engage the audience.

WIDA ELD Standard 1 – English language learners communicate for SOCIAL AND INSTRUCTIONAL purposes within the school setting		
	ELD-SI.6-12.Explain.Receptive: Interpret explanations about social and instructional topics and tasks by evaluating the clarity of their purpose and connections among ideas.	ELD-SI.6-12.Explain.Expressive: Construct explanations that contextualize and detail causes, outcomes, and consequences of social and instructional topics, tasks, and situations.
	ELD-SI.6-12.Argue.Receptive: Interpret arguments about social and instructional topics, tasks, and situations by identifying perspective and evaluating the cohesion of their claims, evidence, and reasoning.	ELD-SI.6-12.Argue.Expressive: Construct arguments for social and instructional purposes with clear claims, evidence, and reasoning.

Language Functions and Language Features

As they work toward meeting the Language Expectations, multilingual learners might...

Ask different types of questions about something (a phenomenon/plot/problems/issue), through...

- Interrogatives including Wh- questions and Yes or No questions to:
 - recall (e.g., *What are the different categories related to...?*)
 - comprehend (e.g., *What happens to? Where does ... ?*)
 - apply (e.g., *How can you use this information?*)
 - analyze (*Is this the same as... Are you sure.. Is it possible... ?*)
 - synthesize (e.g., *Based on the information from the three readings, what are the main concepts...?*)
 - evaluate (e.g., *How applicable to your research paper was the information you gathered during the investigation?*)
- Declarative statements used as questions (e.g., *I wonder*)
- Everyday language to clarify (e.g., *How did you get that? Why did you draw that?*)

Give directions to tell someone how to do or make something, through...

- Doing verbs stated as imperatives (e.g., add, mix, stir)
- Sequential language (e.g., after, before adding)
- Language adding details, numerical information, manner (how) and location (where) to create precise meanings (e.g., *gently, firmly, into the beak, slowly, after adding 10 drops of ...*)

Make tentative claims or suggestions, through...

- A variety of verbs, including thinking verbs (e.g., *I think, I wonder if, it appears to...*)
- Clauses communicating suggestions (*It's likely/unlikely/possible that... Maybe we could, Perhaps we should, It might work better if, I'm not sure it will work*)
- Use of soft modals (e.g., *can, might, may*) and avoidance of strong modals (e.g., *must, have to, can't*) for making suggestions

Restate or summarize an idea, through...

- Saying verbs (e.g., *They suggested.... She summed up*)
- Clauses that summarize (e.g., *all this means is , all these ideas point to ... the conclusion we can make from this is...*)

Question and defend someone's idea, through...

- Interrogatives (e.g., *How does the evidence support your idea that ...? Did you think about ... ?*)
- Statements with causal language (e.g., *It won't work **because**...; That's wrong because...*)

Interpret and select relevant information in a text (oral, written, multimodal) for use in research, through...

- Diagrams, graphics, data, representations, statistics
- Expanded noun groups that add detail to the concept or entity (e.g., *the distinguishable feature of each stage is...*)
- Use of repetition, class/subclass, type/subtype, whole/part relationships

Describe information presented in a graph, table, diagram, through...

- Clauses with expanded noun groups (e.g., *I notice that the sprouting seeds that can be seen in the diagram are...*)
- Language referencing data in observations (e.g., *According to the data; Looking at the graph, you can tell; the trends point to/show that.... the bar graph on the left shows that there is more...*)

Communicate results from investigations/research, through...

- Phenomenon defined, including with relative clauses (e.g., *protein synthesis, **which is the process all cells use to make proteins***)
- General academic concepts expressed through abstract nouns (e.g., *problem, hypothesis, components, cause, factor, experiment*)
- Thinking and doing verbs that communicate results (e.g., *summarized, determined, analyzed, evaluated, predicted*)
- Expanded noun groups that carry details about the process or phenomena (e.g., *the way we solved that problem, the differences between a dividing cell and a non-dividing cell...*)
- Diagrams, graphics, data, representations, statistics that add information to the report



WIDA ELD Standard 2 – English language learners communicate information, ideas and concepts necessary for academic success in the content area of **LANGUAGE ARTS**

ELD-LA.9-12.Inform.Interpretive: Interpret information in Language Arts by analyzing its purpose and development of relationships among ideas, people, or events within complex disciplinary topics.

ELD-LA.9-12.Inform.Expressive: Convey information in Language Arts with an objective voice of authority using style, structures, and complexity tailored to audience.

Language Functions and Language Features

As they work toward meeting the Language Expectations, multilingual learners might...

Organize and connect ideas in text in ways that support its purpose (e.g., give generalized information about entity or a period e.g., *the Harlem Renaissance*), through...

- Cohesive devices (including reference devices, lexical cohesion, ellipsis and substitution) created through repetition, class/subclass, general/specific, whole/part relationships (e.g., *artists - [general] such as Langston Hughes, Louis Armstrong, Countee Cullen [specific]*)
- Topic repeated or rephrased in the beginning of the sentence or paragraph
- Expanded noun groups that add detail to the concept or entity (e.g., *the development of the Harlem neighborhood in New York City*), classifiers (e.g., *African American culture, stage performance*)

Construct definitions of key concepts in research reports, through...

- Abstract nouns and nominalization used to explain concepts (e.g., *artistic explosion, the development of the Harlem neighborhood as ...*)
- Declarative statements that use relating verbs (*was, have, is, belong to, consist of*) and expanded noun groups (e.g., *the subsequent social and artistic explosion that resulted*) to pack information about attributes, qualities, and characteristics (e.g., *The Harlem Renaissance was the development of ...*)

Establish an objective or neutral stance in research reports, through...

- Reference to research, intentional omission of personal pronouns, and use of noun groups (e.g., *artists, prominent figures*)
- Neutral/objective voice of authority with declarative statements, specific and technical word choices without evaluative language (e.g. *the effects v. devastating effects*)

Provide details about attributes, qualities, and characteristics about the entity, through...

- Quantity, factual, classifying adjectives to add specificity about the entity (e.g., *the **golden** age, **black** experience*)
- Language of place (e.g., *from the south to the north*), time (e.g., *from 1910 to 1920, during and after World War I*), and manner (e.g., *in large numbers*) add details about the period of time
- Integration of facts, examples, quotes, diagrams and other visuals cited from multiple sources



WIDA ELD Standard 2 – English language learners communicate information, ideas and concepts necessary for academic success in the content area of **LANGUAGE ARTS**

ELD-LA.9-12.Narrate.Interpretive: Interpret narratives in Language Arts by identifying how their development, organization, and style choices evolve, vary, and create impact.

ELD-LA.9-12.Narrate.Expressive: Construct narratives in Language Arts using intentional sequencing and sophisticated techniques to develop themes and engage the audience.

Language Functions and Language Features

As they work toward meeting the Language Expectations, multilingual learners might...

Orient the reader/listener to the narrative text type (stories or histories), through...

- Expanded noun groups and verb groups that introduce characters, real or imagined
- Language of place /time that describes and/or defines context and setting
- Doing and saying verbs that set up characters
- Feeling and thinking verbs that describe what is going on in the writer's head

Develop and describe characters and relationships among them, through...

- Verb groups describe characters' behaviors and inner worlds (e.g., doing verbs [*raced*], thinking verbs [*believed, was wondering*], feeling verbs [*loved, hoping, longed for*], saying verbs [*screamed, sobbed, mumbled*])
- Expanded noun groups add description and detail (e.g., *The house in the middle of the street that took us back to our neighborhood...*)

Develop the narrative with complications, time sequences, event sequences, resolutions to build a coherent story or account, through...

- Variety of sentence types including dialogue
- Connectors that combine (*and, but, so, yet, or*), link text details and events (*because, as a result, therefore, when, if, although*), and signal time (*meanwhile, during, following*), and sequence events (*first, second, lastly*)
- Cohesive devices (*including reference devices, lexical cohesion, ellipsis and substitution*) that create continuity and flow

Engage the audience, through...

- Evaluative language that describes author's attitudes (e.g., *relevant, simplistic, loved it, hero, brilliant, intense, disappointed*)
- Language that creates literary effects (e.g., *surprise, tension, humor, reflection*)
- Literary devices (e.g., idioms, simile, invented words, intentional use of words from other languages, metaphor, personification, alliteration, figurative and sensory words/phrases, convey images that enrich the text type) used to create an engaging narrative



WIDA ELD Standard 2 – English language learners communicate information, ideas and concepts necessary for academic success in the content area of **LANGUAGE ARTS**

ELD-LA.9-12.Argue.Interpretive: Interpret arguments in Language Arts by identifying their perspective and evaluating the cohesion of their claims, counterclaims, evidence, and reasoning.

ELD-LA.9-12.Argue.Expressive: Construct cohesive arguments in Language Arts tailored to perspective, audience, task, and purpose.

Language Functions and Language Features

As they work toward meeting the Language Expectations, multilingual learners might...

Orient reader/listener to the topic and purpose of persuasion (persuade, evaluate book/character, interpret theme, critique), through...

- Expanded noun groups that provide detail about the issue/book
- Background information that support audience is provided or explained
- Clauses that provide detail about characters/issue

Select relevant ideas and details that support claims with valid and reliable evidence from multiple sources, through...

- Clauses adding details, examples, quotes, data
- Expanded noun and verb groups adding detail
- Connectors signaling alternate points of view (*on the other hand, contrary to common belief, according to*)

Establish perspective/Identify bias, through...

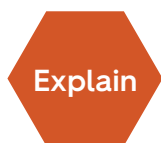
- Passive voice keeping emphasis on main topic rather than who or what is doing the action (e.g., *refugees were housed in primitive tents*)
- Authoritative declarative sentences that evaluate and interpret events (e.g., *Through the author's clever use of imagery and graphic layout, it shows the unique way the author used the graphic novel format.*)
- Evaluative verbs, adverbs, and adjectives (e.g., *dominated; absolutely; compelling*)

Show relationships (*cause/effect, condition, concession*) between claims, counterclaims, multiple perspectives, evidence, and reasoning, through...

- Connectors linking claims with evidence and reasoning (e.g., *because, but, as a result, when, if, although, therefore*)
- Language referencing textual evidence "...."
- Language providing explanations link claim with evidence (e.g., *This shows that the theme is...; From this example, we see that...*)

Organize and connect ideas to support the purpose of the argument, through...

- Reference devices (e.g., *pronouns, synonyms, renaming subject*) creating coherence
- Nominalizations condensing information from previous sentences to build cohesion
- Connectors sequencing the points in the argument (e.g., *First of all, Next, In summary*)



WIDA ELD Standard 3 – English language learners communicate information, ideas and concepts necessary for academic success in the content area of **MATHEMATICS**

ELD-MA.9-12.Explain.Interpretive: Interpret mathematical explanations by evaluating the clarity of logical, causal connections among ideas and identifying the technical details of the steps taken to solve a problem or justify its solution.

ELD-MA.9-12.Explain.Expressive: Construct mathematical explanations that convey technical details, procedural steps, logical organization, and clear relationships among ideas.

Language Functions and Language Features

As they work toward meeting the Language Expectations, multilingual learners might...

Define a mathematical concept or entity, through...

- Expanded noun groups and technical terms (e.g., *The equation for the height of the ball as a function of time is quadratic; linear regression*)
- Relating verbs showing relationships (e.g., *The domain is a function because...*)
- Conditional clauses expressing conditional relationships (e.g., *if the field has a length that is twice its width, then the area is...*)

Interpret and describe data and/or steps to solve a problem, through...

- Visual data displays (*charts, graphs*) with titles, units, and labels
- Causal language justifies reasoning (e.g., *the relationship is a function because a function is...*)

Evaluate results/ Discuss findings, through...

- Language choices to reflect on process (e.g., *we should have done this*)
- Clauses connecting comments to an explanation of thinking (e.g., *This is notable because the number of sign changes should be the maximum number of positive roots*)

Organize and connect ideas in ways that support the purpose of the text, through...

- Connectors linking sentences and longer stretches of text signaling details of time (*next, at the same time*), causality (*therefore, consequently, as a result*), clarification (*for example, as seen in the model*), etc.
- Reference devices (*personal and demonstrative pronouns, articles, text reference*) creating cohesion

Justify your answer, through...

- Increasingly technical math noun groups (e.g., *rational number coefficient*)
- Reasoning expressed through causal language (e.g., *the relationship is not a function because a function is...*)



WIDA ELD Standard 3 – English language learners communicate information, ideas and concepts necessary for academic success in the content area of **MATHEMATICS**

ELD-MA.9-12.Argue.Interpretive: Interpret mathematical arguments by following and evaluating the coherence of their line of reasoning.

ELD-MA.9-12.Argue.Expressive: Construct mathematical arguments with cohesive logic, evidence, technical details, and acknowledgment of constraints.

Language Functions and Language Features

As they work toward meeting the Language Expectations, multilingual learners might...

Conjecture by making a claim: always, sometimes, never true, through...

- Simple sentences with adverbs of frequency *never, always, sometimes* (e.g., *Lines with equivalent slopes will never intersect*)
- Conditional clauses (e.g. *If a population doubles each week, then it will always be 16 times the original population after 4 weeks*)
- Comparative language with precise mathematical terms (e.g., *For all real numbers... For all x values greater than or equal to - 5...*)
- Simple sentences generalizing beyond the original range (e.g., *The rule $f(x) = 9x - 4$ can be used to find any point on the line*)

Justify answers by providing evidence and mathematical facts (explaining why a generalization is true or false), through...

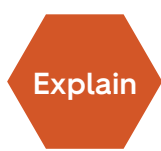
- Variety of clauses (e.g., *By the triangle sum theorem,...*)
- Clauses convincing others of the validity of their argument (e.g., *Because any number divided by itself is 1, then...*)

Make a logical argument by using already-understood ideas and underlying relationships, through...

- Declarative statements (e.g., *All right angles are congruent to one another*)
- Increasingly technical math noun groups (e.g., *Two-way frequency table; a constant second difference of positive 5*)
- Causal language (e.g., *We chose to model the relationship with an exponential graph because...*)

Evaluate the arguments of others (critique), through...

- Questions critiquing reasoning (e.g., *How did you find your answer? Will that always be the case?*)
- Simple sentences showing agreement or disagreement (e.g., *I disagree, I found a counterexample...*)
- Evaluative language identifying misconceptions (e.g., *The rectangle doesn't **always** have perpendicular diagonals because it **may** have two sides that are **longer** than the two other sides, e.g., The proof is **invalid** because...*)



WIDA ELD Standard 4 – English language learners communicate information, ideas and concepts necessary for academic success in the content area of **SCIENCE**

ELD-SC.9-12.Explain.Interpretive: Interpret scientific explanations by analyzing perspective and the organization of their ideas, concepts, and technical details about phenomena.

ELD-SC.9-12.Explain.Expressive: Construct complex scientific explanations that convey a perspective of authority linking parts of systems or factors, outcomes, and consequences of phenomena with support from logic and data.

Language Functions and Language Features

As they work toward meeting the Language Expectations, multilingual learners might...

Describe observations of a phenomenon or data gathered about a phenomenon, through...

- Phenomenon defined using various strategies
- Relating verb groups stating relationships or attributes (e.g., *have, be, belong to*)
- Diagrams, graphics, data, statistics adding information or illustrate content

Define science ideas and concepts that help to explain how or why a phenomenon occurs, through...

- Nominalizations representing abstract concepts (e.g., *effects, vision, impairment, perception*)
- Technical terms presenting ideas and concepts (e.g., *antioxidants, contaminant*)
- Connectors linking clauses to combine ideas into logical relationships (e.g., *as a result, therefore*)
- Variety of clause types expressing causality (e.g., *Unable to grow or repair themselves, the corals eventually die*)

Identify bias/perspective in how scientific results are communicated about an observed phenomenon, through...

- Passive voice fostering an objective stance (e.g., *the heat within the earth is transmitted*)
- First person avoided to construct scientific authority, may refer to self and audience to establish shared interest in a topic (e.g., *eyes produce incredible high quality images we rely on for many daily activities*)
- Declarative statements constructing facts (e.g., *Disease spreads through human contact*)

Adjust language for different audiences, through...

- Language resources for hedging (e.g., *certainly, usually, one possible explanation, could/may/might*)
- Evaluative language (e.g., *significance, excellent*) used to be precise, to soften knowledge claims, and to show deference to experts

Organize and connect ideas in ways that support the explanation, through...

- Reference devices at the beginning of sentences building information logically (e.g., *pronouns, synonyms, renaming subject*)
- Cause/effect relationships expressed through given (*previously stated*) and new (added details, examples) information often with nominalization (e.g., *Pollen is moved within flowers or carried from flower to flower ... **Pollination** is the process...*)



WIDA ELD Standard 4 – English language learners communicate information, ideas and concepts necessary for academic success in the content area of **SCIENCE**

ELD-SC.9-12.Argue.Interpretive: Interpret scientific arguments by identifying technical details and examples of formal scientific voice, as well as evaluating the cohesion among their claims and evidence (data).

ELD-SC.9-12.Argue.Expressive: Construct formalized and cohesive scientific arguments with strong claims, detailed technical descriptions of evidence (data), and nuanced analysis of how evidence supports or refutes a claim.

Language Functions and Language Features

As they work toward meeting the Language Expectations, multilingual learners might...

Orient the reader/listener to the topic of the argument, through...

- Phenomenon defined using various strategies
- Background information to support audience
- Diagrams, graphics, data, statistics adding information

Select and use relevant information in a text, model or data to support a scientific argument, through...

- Expanded noun groups classifying and/or adding detail (e.g., *greenhouse gases, gradual atmospheric changes*)
- Causal language describing evidence (e.g., *Gradual atmospheric changes were due to plants and other organisms that captured carbon dioxide and released oxygen.*)

Signal logical relationships between claim, evidence, and reasoning, through...

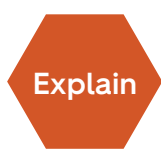
- Connectors that link clauses to combine ideas into logical relationships (e.g., *as a result, therefore*)
- Clauses that link claim with evidence and reasoning (e.g., *based on this data, the scientific principle here is...*)

Establish perspective/Identify bias, through...

- Passive voice keeping emphasis on main topic rather than who or what is doing the action (e.g., *Helium is created in the stars*)
- Authoritative declarative sentences that evaluate and interpret events (e.g., *A lot of our helium source has already been depleted because of the fact that helium is lighter than air, and will float into space, throughout our atmosphere*)

Organize and connect ideas in ways that support the purpose of text, through...

- Connectors linking sentences and longer stretches of text signaling details of time (*next, at the same time*), causality (*therefore, consequently, as a result*), clarification (*for example, as seen in the model*), etc.
- Reference devices (*pronouns, synonyms, renaming subject*) creating cohesion
- Nominalizations condensing information from previous sentences to build cohesion (e.g., *Pollen is moved within flowers or carried from flower to flower ... Pollination is the process...*)



WIDA ELD Standard 5 – English language learners communicate information, ideas and concepts necessary for academic success in the content area of **SOCIAL STUDIES**

ELD-SS.9-12.Explain.Interpretive: Interpret Social Studies explanations by analyzing the clarity of relationships among causes, outcomes, or consequences of events, systems or phenomena.

ELD-SS.9-12.Explain.Expressive: Construct Social Studies explanations that convey a perspective of authority on events, systems or phenomena with purposeful organization and clear relationships among carefully contextualized ideas.

Language Functions and Language Features

As they work toward meeting the Language Expectations, multilingual learners might...

Orient reader/listener to the phenomena or historical event being explained, through...

- Prepositional phrases describing specific conditions, time, and place
- Relative clauses defining phenomena or events (e.g., *Missouri Compromise in which both the North and South argued about the spread of slavery*)

Relate the factors that contribute to a particular outcome (e.g., *what are the factors that led to mass incarceration?*), through...

- Technical terms representing abstract concepts (e.g., *factors, effects, relationship*)
- Nominalization compacting clauses into one noun (e.g., *reunification, criminalization*)
- Clause structures expressing causal relationships between events (e.g., *because of X, Y happened*)
- Evaluative resources (e.g., *the major cause is; made worse by*)

Identify the outcomes or consequences of a phenomenon (e.g., *what effects did the Industrial Revolution have on women in England?*), through...

- A variety of clause types (e.g., *which forced them to surrender; leaving them no choice but to flee their homes*)
- Expanded noun groups that pack in details to a description

Express bias/perspectives, through...

- Passive voice that keeps the emphasis on the main topic rather than who or what is doing the action (e.g., *refugees were housed in primitive tents*)
- Authoritative declarative sentences that evaluate and interpret events (e.g., *Rejecting the rigid rules of fine arts, Impressionist artists showcased a new way to observe and depict the world*)
- Evaluative verbs (e.g., *dominated, succumbed to*) and adjectives (e.g., *ineffective, powerful*) that judge behavior or moral character
- Action verbs that construct agency and make who did what to whom transparent

Organize and connect ideas in ways that support the purpose of the text, through...

- Causal connectors that express logical relationships (e.g., *as a result, therefore*)
- Sentence starting points that establish cohesion through repetition, substitution and pronoun referencing



WIDA ELD Standard 5 – English language learners communicate information, ideas and concepts necessary for academic success in the content area of **SOCIAL STUDIES**

ELD-SS.9-12.Argue.Interpretive: Interpret Social Studies arguments by identifying perspective and evaluating the cohesion among their claims, counterclaims, evidence, and reasoning.

ELD-SS.9-12.Argue.Expressive: Construct cohesive Social Studies arguments tailored to perspective, audience, task, and purpose.

Language Functions and Language Features

As they work toward meeting the Language Expectations, multilingual learners might...

Orient reader/listener to the issue and purpose of argument, through...

- Background information to support audience
- Expanded noun groups that provide detail about the issue with relative clauses (e.g., *the German reoccupation of... which, Germany's growing domination which expanded into...*)

Select relevant ideas and details that support claims with valid and reliable evidence from multiple sources, through...

- Clauses adding details, examples, quotes, data (e.g., *after looking at sources, from these sources, multiple sources suggest*.)
- Language of time, place, manner and what happened
- Doing verbs (e.g., *contradict, support, challenge*) that construct agency and make who did what to whom transparent

Show relationships (*condition, concession*) between claims, counterclaims, multiple perspectives, evidence, and reasoning, through...

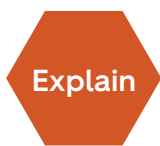
- Connectors linking claims with evidence and reasoning (e.g., *because, but, as a result, when, if, although, therefore*)
- Connectors signaling alternate points of view (*on the other hand, contrary to common belief, according to*)
- Connectors showing concession or comparison/contrast (e.g., *while, although*)

Establish perspective, through...

- Passive voice keeping emphasis on main topic rather than who or what is doing the action (e.g., *refugees were housed in primitive tents*)
- Authoritative declarative sentences evaluating and interpreting events (e.g., *Rejecting the rigid rules of the art of their predecessors, Impressionist artists showcased a new way to observe and depict the world*)
- Evaluative verbs, adverbs, and adjectives (e.g., *dominated; absolutely; compelling*)

Organize and connect ideas in ways that support the purpose of the argument, through...

- Reference devices creating cohesion (e.g., *pronouns, synonyms, renaming subject*)
- Given/New structures (e.g., *through nominalizations*) condensing information from previous sentences to build cohesion



Expressive Language Expectation: Multilingual learners use language to....

ELD-SC.9-12.Explain.Expressive: Construct complex scientific explanations that convey a perspective of authority linking parts of systems or factors, outcomes, and consequences of phenomena with support from logic and data.

Task/Situation: This text was used by an ESL Biology teacher to support students in language and content learning. Students were asked to read for 'main idea' and make connections to what they learned in class. The teacher provided them with a list of key vocabulary to support their reading. These were the instructions for the students:

Purpose: To improve my ability to read for main idea and make connections between what we have learned in class to the real world. Use the key vocabulary to help you with the article

Learning Target: Circle 3 KEY WORDS, Underline 3 main idea sentences, and WRITE 3 comments or questions. Put a ? next to words you are unsure of. Write a summary.

Credit: Cory Hayden (West High School, Madison, WI)

**Language
Functions**

Engage
audience

Text

Exploding Water

Exploding water? Technically, yes, water can "explode". However, it takes near perfect conditions to bring this about "exploding water" and it is not something the average hot beverage drinker would need to fear. Odds are, you'll go through life without ever viewing this phenomenon first-hand, and if you're one of the rare few who does get to see it, you will likely not be harmed by the experience.

**Language
Features**

- Dialogue with the reader
- Evaluative language (*near perfect, average, fear, rare, harmed*)
- Language resources for hedging (*technically, odds are, likely not*)
- Direct address to audience (*average hot beverage drinker, you'll, you're, you*)

* content and layout not final

Language Functions

Define science ideas and concepts to help explain why a phenomenon occurs

Explain the phenomenon

Text

Before water will explode a portion of the water in the cup becomes superheated. That means the liquid temperature is slightly above the boiling point, where it would normally form a gas. In this case, boiling is hindered by a lack of nucleation sites needed to form the bubbles. When heated in a microwave the water gets hot but the container usually does not. There are no “boiling-bubbles” like the ones triggered by a hot metal pot. Without those bubbles to cool it, the temperature of the water can rise far higher than 100C°.

Glass containers are clearly the most likely to superheat water because their surfaces are essentially perfect. When you overheat water in a clean glass cup, your chances of superheating it at least mildly are surprisingly high. The spontaneous bubbling that occurs when you add sugar, coffee powder, or a teabag to microwave-heated water is the result of such mild superheating. If enough water is superheated, each of these microbubbles can expand into a 1cm steam bubble, and the result is a huge “explosion” of hot froth. It's just like

dumping ice cream into root beer, but the froth can be so violent that the hot water sprays into the air. Fortunately, severe superheating is much less common because defects, dirt, or other impurities usually help the water boil before it becomes truly dangerous. That's why most of us avoid serious injuries.

Language Features

Switch to objective stance which constructs scientific authority (*no second person addressing audience directly*)

Declarative sentences (e.g., *That means... gas; boiling is hindered...bubbles*)

Relating verb groups state attributes (*is, is, gets, are*)

Technical terms present ideas and concepts (e.g., *superheated, boiling point, nucleation sites*)

Connectors link clauses to combine ideas into logical relationships (e.g., *before, in this case, when, but, without, when, if, but, before*)

Cause/effect relationships are expressed through given (previously stated, e.g., *hot froth*) and new (added details, examples, e.g., *it's just like dumping ice cream into root beer*)

Language Functions

Summarize explanation in the form of a recommendation

Text

What Can Consumers Do to Avoid Super-Heated Water?

1. Follow the precautions and recommendations found in the microwave oven instruction manuals, specifically the heating time.
2. Do not **use** excessive amounts of time when heating water or liquids **in the microwave oven.**
3. Determine the best time setting to heat the water just to the desired temperature and use that time setting regularly.

Language Features

Steps are ordered numerically (not with sequential language)

Doing verbs stated as imperatives (*follow, use, determine*)

Language to make precise meaning about where (*in the microwave oven instruction manual; in the microwave oven*) and how (*to the desired temperature*)

Interpretive Communication Modes

WIDA Proficiency Level Descriptors for Listening, Reading, and Viewing

The WIDA Proficiency Level Descriptors outline an interlocking set of criteria to use when measuring multilingual learner language performance in activities that target the WIDA Language Expectations. Each language proficiency level is cumulative, building on previous levels (e.g., PL 4 = PL1 + PL 2 + PL3 + PL4).

Dimension	End of Level 1 Entering	End of Level 2 Emerging	End of Level 3 Developing	End of Level 4 Expanding	End of Level 5 Bridging	Level 6 Reaching
	As multilingual learners near the END of each proficiency level, and with appropriate scaffolding and multimodal communication, they will make meaning by processing:					
Discourse Organization of language	Text that conveys a clearly signaled purpose; with relationships explicitly arranged in a short, sequence (with a few details)	Text that conveys a clearly signaled purpose; with relationships arranged in an extended sequence	Text that conveys a purpose and clearly signaled perspective; with relationships arranged in increasingly extended sequences	Text that conveys several, integrated purposes and perspectives; with relationships arranged in long, elaborated sequences	Text that conveys a variety of integrated purposes, perspectives, and situations; with relationships arranged in elaborated or condensed sequences	Text that conveys a wide variety of integrated purposes, perspectives, and situations; with relationships flexibly arranged in a variety of sequences
Cohesion of language	Ideas linked by pronoun substitution; contrasting connectors	Ideas linked by an umbrella (superordinate) term; common comparative connectors	Relationships among ideas signaled by an increasing range of cohesive devices	Ideas that have been condensed and collapsed into abstract themes and concepts using an increasing range of cohesive devices	Ideas that have been arranged in given and new patterns to build information sequencing	Ideas arranged into tightly knit given and new patterns; information sequencing built through expanded noun groups and nominalizations
Density of language	Important information found in expanded noun groups with adjectives and adverbs added before or after nouns	Important information found in expanded noun groups with relative clauses added after nouns	Important information found in expanded noun groups; increasing complexity of modifiers added before or after nouns	Important information compacted into abstract nouns (nominalizations)	Important information found in expanded noun and verb groups with a wide complexity of pre- and post- modifiers	Important information compacted into embedded clauses after expanded noun groups and nominalizations
Amount of language	A series of sentences	Short, connected discourse	Longer stretches of connected discourse with multiple, varied sentences	An increasing variety of expanded or concise discourse	A wide variety of expanded or concise discourse	A wide variety of elaborated or tightly knit discourse
Sentence Grammatical complexity of language	Simple sentences with auxiliary verbs and prepositional phrases	Complex sentences beginning with a dependent clause	Complex sentences with a relative clause that contains an infinitive	Complex sentences with passives clauses that use infinitives	Complex sentences with few (or no) conjunctions due to use of ellipsis or nominalization	Complex sentences with logical connections without explicit use of conjunctions
Word/Phrase Precision of language	A narrow range of everyday, general, and disciplinary language, including collocations and cognates	An increasing range of everyday and general language, including words and phrases with a common schema	A narrow range of disciplinary language, including specialized terminology; adverbials, adjectives showing different degrees of possibility	An increasing range of disciplinary language, including technical terms and idiomatic expressions	A wide range of disciplinary language, including shades of meaning [certainty, likelihood], hedging, connotative meanings	A wide range of disciplinary language with technical and abstract meanings, highly specialized terms, nuance, metaphor, puns, sarcasm

Dimension	End of Level 1 Entering	End of Level 2 Emerging	End of Level 3 Developing	End of Level 4 Expanding	End of Level 5 Bridging	Level 6 Reaching
	As multilingual learners near the END of each proficiency level, and with appropriate scaffolding and multimodal communication, they will make meaning by processing:					
Discourse Organization of language	Text that conveys an increasing range of common social purposes or instructional routines	Text that inconsistently conveys a clearly signaled purpose; with few connections made within a short sequence	Text that more consistently conveys a clearly signaled purpose; with relationships extended into a longer sequence	Text that consistently conveys a purpose and clearly signaled perspective; with relationships arranged into extended, detailed sequences	Text that consistently conveys several, integrated purposes and perspectives; with relationships appropriately arranged in long, elaborated sequences	Text that effectively conveys a variety of integrated purposes, perspectives, and situations; with relationships arranged in elaborated or condensed sequences
Cohesion of language	Ideas linked by repeated words	Ideas linked by closely associated words; basic connectors	Ideas linked by pronoun substitution; contrasting connectors	Ideas linked by an increasing range of adding, contrasting, causal, and conceding connectors	Ideas that have been condensed into abstract themes and concepts using an increasing range of cohesive devices	Ideas that have been arranged in given and new patterns to build information sequencing
Density of language	Important information easily found in simple noun group with possessive adjectives added before noun	Information easily found in simple noun groups; relative pronoun added after noun	Information easily found in expanded noun groups; adjectives added before or after nouns	Important information found in expanded noun clauses with relative clauses added after nouns	Important information compacted into abstract nouns (nominalizations)	Important information found in expanded noun and verb groups with a wide complexity of pre- and post- modifiers
Amount of language	Word/phrases and clauses	A variety of short sentences	An increasing variety of short sentences	Multiple series of parallel sentences	Longer stretches of connected discourse with multiple, varied sentences	An increasing variety of expanded or concise discourse
Sentence Grammatical complexity of language	Simple phrasal patterns; with limited control	Simple sentences with basic auxiliary verb; with occasional control	Simple sentences with two-word verbs; with occasional control	Complex sentences beginning with a dependent clause; with variable control	Complex sentences with a relative clause that contains an infinitive; with control	Complex sentences with few or no conjunctions due to use of ellipsis or nominalization; with control
Word/Phrase Precision of language	A narrow range of everyday, general, and disciplinary language used routinely across social and classroom contexts	An increasing range of general language, including simple word families	A wide range of general language, including collocations [commonly paired words] and cognates	A narrow range of disciplinary language including multiple meanings	An increasing range of disciplinary language, including technical terms and idiomatic expressions	A wide range of disciplinary language, including shades of meaning [certainty, likelihood], hedging, connotative meanings [subtle social and cultural references]



Appendices

WIDA English Language Development Framework, 2020 Edition

Appendices

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Appendix A

Metalinguage Glossary Used in the WIDA Standards

Causal language: language resources that express causality. Causality include both language of causes and effects. Typical and most commonly used causal connectors are *because* and *so*. They can be expressed through connectors *therefore*, *consequently*, *as a result*, nouns such as *the result*, *the effects* and entire clauses (e.g., *Unable to grow or repair themselves, the corals eventually die*), verbs *are caused by*, *resulting in*.

Clause: a unit of meaning that expresses an idea or message. Clauses are useful in understanding how ideas are expressed and what makes a text complex.

Coherence: The way in which a text holds together through links in meanings within the text and in a larger context.

Cohesion: The way in which a text holds together through grammatical and lexical features (see **Connectors**, **Given/New** and **Lexical cohesion**) which link one part of the text with another.

Cohesive Devices: Resources used to tie together ideas in a text and make it “stick together.” Examples of cohesive devices include **reference devices**, **lexical cohesion**, **substitution** and **ellipsis**.

Conjunction: A type of function word that connects clauses and builds relationships between parts of the clause or text.

Connector: Refers to the conjunctions, text connectives, and other linking phrases used to connect ideas in sentences and signal different relationships (causal, additive, time, etc). They create cohesion and a logical development across a text.

Function/Meaning	Examples Connectors
Addition	<i>and, and then, furthermore, in addition, apart from that, furthermore, besides, along with, again, along with</i>
Cause/Consequence	<i>because, so, despite, nevertheless, even though, so, therefore, consequently, due to, because of this, as a result</i>
Comparison/contrast	<i>but, for example, instead, in other words, however, in fact, in that case, while, although, on the other hand, despite</i>
Condition	<i>if, unless</i>
Purpose	<i>in order to, so</i>
Sequence	<i>first, second, finally, in the first place, to start with, at this point, to get back to the point, in short, all in all, to conclude</i>
Time	<i>when, then, next, afterwards, after a while, at the same time, at this moment, meanwhile, previously, before that, finally</i>

Conditional clauses: a type of clause that shows a condition, most commonly introduced by the conjunction *if* or *unless*. The conditional clause can either go before the main clause or after it. E.g., *The seeds will sprout in a week unless someone forgets to water them.* Or *Unless someone forgets to water the seeds, they will sprout in a week.*

Declarative: A sentence with subject-verb order, typically used to make statements.

Disciplinary Language: Content-specific language that relates to common academic concepts; Technical and Abstract Language are subsets of Disciplinary Language. (Language use becomes more formal than oral language and often involves a distant audience)

Evaluative language: language for expressing different attitudes including positive and negative attitudes towards people and phenomena. Evaluative language is used to build up empathy and suspense in stories, make moral judgments of people's behavior, assess the quality of objects such as literary or artistic works, people's appearance or other natural or man-made phenomena. Evaluative language includes nouns, verbs, and adjectives. E.g., significant, happy, laugh, reassure, trusting (positive), frighten, irrelevant, worthless, shallow, mean, empty, sadly, dislike (negative).

Everyday Language: Everyday, social language; basic vocabulary (Language use closely resembles oral language and often involves a shared audience in an immediate, concrete context).

General Language: Common academic language that is used across content area [disciplinary] contexts (Language use becomes more precise and increasingly distinct from oral language)

Genre: multimodal texts (oral, written, visual, computer-mediated) recur frequently for specific purposes, with specific discourse organization patterns and language features.

Given/New Pattern: This pattern functions to build information sequencing between sentences. The **given (or known)** information is placed at the beginning of the sentence. The **new (or unknown)** information is placed at the end of the sentence. In the sentence that follows, the **new** information is picked up as **given** so that more information can be added, typically through the use of nominalization. For example, in the following two sentences this information sequencing with given and new information occurs:

***The most important thing that bees do** [given] is **pollinate** [new]. **Pollination** [given] is *the transfer of pollen from a stamen to a pistil* [new].*

***The most important thing that bees do** is presented in the sentence as **given** information and **pollinate** is the **new** information. Then the sentence following starts with a nominalization **pollination**, presented as **given**, that picks up the concept **pollinate** presented in the previous sentence as **new** so more information can be added.*

Imperative: A sentence with no subject, typically used for commands.

Interrogative: A sentence where the auxiliary clause comes before the subject, typically used for questions.

Language (also see Systemic Functional Linguistics): Language is a dynamic meaning-making resource. It is not a static inventory of structures. Meanings are realized through structures, however, it is ultimately meaning that language is concerned with. “Language is for the living of life, not for the production of structures” (Hasan, 2008/2011).

Language Development: the development of language from functional perspective is an expansion of students’ linguistic repertoires and what students can do with language functionally (see **Language Functions**) and not just students’ development of sentences from shorter to longer but. This approach to language views language development as an extension of multilingual learners’ functional range in a diversity of contexts that expand through the years of schooling (Christie & Derewianka, 2008).

Language Features: Language features describe how language users build meaning. They fall into several broad categories, including:

1. lexical features, such as vocabulary (general, specific, or technical), nouns of different kinds (persons, places, things, processes, etc.) and noun groups (see **Noun groups**), verbs with different functions (*relating, thinking, saying, feeling, doing verbs*, etc.) (see **Verbs**), words that express emotions and judgments (see **Evaluative language**), idiomatic expressions, and connectors (see **Connectors**)
2. grammatical features, such as part of speech, word order, phrase construction (noun groups, verb groups, prepositional phrases, etc.), verb tense, clause (simple, compound, and complex, see **Clause**),
3. situational considerations such as register choices, pragmatic features (such as indications of respect and construction of politeness), repetition, rhythmic use of language (such as parallelism), and others.

Language Functions: Language functions are “*doings*” with language. They are called language functions because they show functionality of language versus a set of vocabulary or grammar students must produce. Instead of saying, students will use expanded noun groups or prepositional phrases, language functions focus on the doing: Students will *describe characters or setting* using expanded noun groups and language of place and time. For example, “*Early on Wednesday morning, before the birds were awake, my dad and I went fly fishing at Black Earth Creek.*”

Lexical: A lexical item is a vocabulary item.

Lexical Cohesion: Connecting ideas by using words that are associated with each other, such as synonyms (similarities), antonyms (opposites). Lexical cohesion is also built through other word

associations such as whole to part and general to specific. We can also build lexical cohesion through repetition.

Lexical Density: lexical density is a quantitative measure of text complexity and can be measured in a number of different ways. One way to measure text complexity is to divide the number of content words (nouns, verbs, adjectives, and adverbs) in a sentence by the number of clauses in that same sentence. Higher numbers would thus indicate higher lexical density. *The important point of this method is not necessarily to do the math accurately but instead to consider how many content words there are in each clause.* Expanded noun and verb groups place a heavy load on our working memory and so are challenging to interpret.

Metalinguage: A language for talking about language. For example, language for talking about cohesion is lexical cohesion, synonyms, antonyms, etc.

Nominalization: Nominalization occurs when events and qualities are represented as “things,” using an abstract noun instead of a verb or adjective. For example, instead of saying *The party was a success because she organized things so well*, we may choose to say *The success of the party was due to her great organization*. We do this because the less typical way is more efficient (as in the example above, which condenses the information into one clause instead of two), or because it helps us build cohesion by putting ideas we’ve mentioned in one sentence at the beginning of the following sentence. Many abstract and technical terms are nominalizations, used to help us condense information. At the same time, nominalization often emphasizes an end result of an action while making the doer of that action disappear (see the third example below). Nominalization is one of the major differences between spoken and written language.

Noun Groups: A noun group is a group of words relating to a noun. An *expanded noun group* structure typically includes pre-modifiers and post-modifiers adding information about the noun. These modifiers can include determiners (*the bees*), prepositional phrases (*bees in the beehive*), demonstratives (*these bees*), adjectives or adjectival phrases (*hardworking bees*), quantifiers (*many bees*), classifiers (*Western honeybees, Carpenter bees*), and relative clauses (*bees that pollinate crops and flowers*) or a combination of these modifiers (*hardworking non-aggressive pollinator bees*).

In English Noun groups are governed by their own grammar, i.e., there is an order of how words can be put together. The typical order in the phrase *the two delicious pumpkin pies that I made for my family on Thanksgiving* is: article (*the*), quantity (*two*), opinion (*delicious*), classifying (*pumpkin*), main noun (*pies*), and post-modifiers in forms of clauses (*that I made for my family on Thanksgiving*)

Passive voice: Passive voice happens when the object (or recipient) of an action is the subject of a sentence, as in *The door was kicked with much force*. (Someone kicked the door but it might not be important to state who did it or we might not know who that was. We only know that an action changed the state of the door.) Writers, and sometimes speakers, can choose to use the passive voice intentionally, and usually for one or more of the following reasons: to foreground the result of an action, hide who is to blame for an action, foster an objective stance, and avoid mentioning a doer that is unknown or unimportant. Passive voice is an important language feature to recognize, analyze, and know how to use. It contributes to text complexity because the ideas are no longer in their typical or expected order. The degree to which an entity is presented as an active agent, rather than being acted upon is called agency.

Reference devices: Words that stand for other words to create cohesive ties, presented in pronouns, demonstratives, and synonyms, among other linguistic resources.

- Personal pronouns such as *you, she, they* that refer to living and non-living things (e.g., *People use maps to find where they need to go.*);
- Definite articles: *the* (e.g., *Can you hold the pencil?*) *The* refers to the pencil previously mentioned.
- Demonstrative pronouns such as *this/these, that/those, there* that refer to living and non-living things, places, or actions mentioned previously (e.g., *Once you decide where you want to go, you need to find out how to get there.*);
- Qualifiers such as *many/some/several* (e.g., *Maps used to be drawn by hand. Many had pictures of fantastic beasts and other decorations.*).
- Comparatives such as *same/different, other, bigger/est, more/less* (e.g., *This map has a lot of detail but that one has more and shows when you are going up or down.*);
- Text reference, where we use a pronoun (such as *this/these* or *that/those*) as a substitute for an idea or phenomenon described in one or more sentences, and even a section of text (e.g., *Maps are flat but the world is round. This is why globes are so useful.*).

Register: A variety of language which is distinguished by its context of use, or by the situation in which it is used. Situation includes several elements such as audience, task, purpose, setting, roles and relationship, and mode of communication (written versus spoken).

Sentences

Simple sentences contain a single independent clause but are not necessarily short (as in *Pooh always liked a little something at eleven o'clock in the morning*).

Compound sentences have two or more independent clauses, each providing important information and so having equal status. The clauses are often linked with conjunctions such as

and, so, but, yet, either ... or.

Complex sentences have multiple clauses as well and are useful in conveying more intricate and detailed relationships among ideas. The relationships between the clauses is not equal in that one of the clauses is independent (i.e., it can stand on its own as a complete sentence) and the other one is dependent (i.e., it cannot stand on its own). Complex sentences are often used to provide a reason, state a purpose, express a condition, make a concession, say when or how something happened, and so on. Clauses in complex sentences are often joined by conjunctions such as *after, before, as long as* (for time); *as if, like* (for comparison); *because, since, in case, as a result of* (for reason); *as long as, unless* (for condition); *although, even if, despite* (for concession); *besides, as well as* (for addition), *except for, instead of* (for replacing), and so on (Derewianka, 2013).

Another language feature that creates complex sentences is *embedding*. Embedding adds detail and specificity. We can use embedding to specify and elaborate on nouns (as in the first example of embedding below). We can also use embedding with reporting, saying, or thinking verbs (as in the second example of embedding).

<i>Type of sentence</i>	<i>Sample Text</i>	<i>Comments</i>
Simple sentence	<i>Could someone rephrase that?</i>	Conveys a single idea.
Compound sentence	<i>I would like you to read independently and write down the main plot points in the chapter.</i>	Has two clauses joined by <i>and</i> .
Complex sentence	<i>When you are done, discuss your notes with a partner to see if you have missed any important events.</i>	Has four clauses: dependent clause specifying time (<i>when you are done</i>), an independent clause (<i>discuss your notes</i>), a dependent clause explaining reason (<i>to see</i>), and a dependent clause showing condition (<i>if you have missed</i>).

Sentences with embedded clauses

*Could someone **who hasn't spoken yet** rephrase that? It is my expectation **that everyone should participate.***

The embedded clauses makes the teacher's request more detailed and specific.

Substitution and Ellipsis

As a text unfolds, words may be substituted or omitted to avoid unnecessary repetition. Any element of a clause or even an entire clause can be substituted or omitted.

- Common noun substitutions: *ones, some, other, another one, same one, else, more* (e.g., *There were two rocks and I chose the smooth one.*)
- Common verb substitutions: *do, does, did, have, will* (e.g., *Some rocks break easily but others don't.*)
- Other substitutions: *so* (e.g., *Water can pass through rock. To do so, it has to find air spaces that are connected.*), *none* (e.g., *If there are none, the water won't pass through the rock.*); possessive pronouns: *mine, yours, theirs, hers* (e.g., *My rock is permeable but hers isn't.*)
- Ellipsis: Ellipsis is when, after a more specific mention, words are omitted (e.g., *Water will pass through rock [specific mention] only if the air spaces are connected. Otherwise, it won't [omission of "pass through rock"]*)

Syntactic structures: Ways in which words, phrases, and clauses are constructed and combined in sentences.

Systemic Functional Linguistics (SFL): Michael Halliday's (and developed by others) linguistic theory that offers a framework for connecting language forms and meaning in contexts of use and for viewing grammar as a meaning-making resource. It is *systemic* because it is a system of choices in context and *functional* because it allows people to accomplish things with in life (versus produce grammatically correct structures).

Text: Text is a unit of meaning with a purpose in a particular context (we choose to emphasize meaning in this definition to avoid talking about text as a string of sentences. When we create text, we create meaning). Meaning can be created with different meaning-making systems: art, words, sound, symbols, color, movement. Texts can be written, oral (conversations or presentations), digital (websites or news broadcasts), visual (diagrams, art, posters, advertisements), or a combination of all these types. Texts tend to be multimodal: they can contain symbols, maps, timelines, drawings, and other modalities. While visual texts are often used as supports, it is important to note that students may need guidance in learning how to interpret pictures, diagrams, charts, timelines, and other visuals.

Text Complexity: Refers to how challenging a text is to process and interpret. Text complexity involves a number of very different features. In this glossary, you will find four language features that contribute to text complexity: **lexical density**, **nominalization**, **passive voice**, and **syntactic complexity**.

Verb Group: Verb groups show what is going on in a sentence (the *doing, thinking, feeling, saying* or *relating*). Each kind of verb has a different function. The different kinds of verbs help students understand when authors are representing actions, when they are describing or defining, and when they are telling us what actors have said, thought, or felt.

- *Doing verbs* represent actions
- *Relating verbs* show relationships between ideas
- *Thinking verbs* represent thought
- *Feeling verbs* represent feelings
- *Saying verbs* indicate what someone or something has said

Technical Language: A type of specialized disciplinary language that is central to building knowledge and conceptual understanding; signals mastery of a particular discipline (Language use becomes more formal than oral language and often involves a distant audience)

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Appendix B

High-Level Comparison of WIDA Standards Editions From 2004 to 2020

This figure outlines the evolution of distinguishing features in four editions of WIDA ELD Standards Editions since its inception in 2004 to 2020 while maintaining its original five standards statements.

WIDA Consortium English Language Proficiency Standards, 2004 Edition	The WIDA English Language Proficiency Standards, 2007 Edition	The 2012 Amplification of the WIDA English Language Development Standards	WIDA ELD Standards, 2020 Edition
Language Domains: Listening, Speaking, Reading, Writing			Interpretive (Listening, Reading, Viewing) and Expressive (Speaking, Writing, Representing) Language Expectations
Language Supports through English Language Proficiency Levels 2-3	Language Supports through Level 4		Multimodal communication through Level 6
Wide range of language functions, such as: connect, describe, distinguish, identify, infer, justify, paraphrase, recount, relate, and state within Model Performance Indicators			Key Language Uses*- Narrate, Inform, Explain, Argue- as an organizing frame with supporting Language Expectations, Language Functions and Language Features
K-12 Performance Definitions addressing three criteria: linguistic complexity; technical language; phonological, syntactic, and semantic understanding and use	PreK-12 Performance Definitions addressing three criteria: linguistic complexity, language control, vocabulary usage	Updated K-12 Performance Definitions addressing three criteria: discourse, sentence, and word/phrase dimensions for Receptive and Productive Language	Proficiency Level Descriptors by Grade-level Cluster (K, 1, 2-3, 4-5, 6-8, & 9-12) aligned to 2012 K-12 Performance Definitions addressing three criteria: discourse, sentence, and word/phrase dimensions for Interpretive and Expressive Language
Content topics in Model Performance Indicators with additional topics addressed through transformations		Connections to Academic Content Standards and strands of Model Performance Indicators	Concepts (in Summary Tables) derived from Academic Content Standards and Disciplinary Practices tied to Language Expectations

* *The Can Do Descriptors, Key Language Uses Edition (2014) introduced four key uses of academic language- Recount, Explain, Argue and Discuss. This supplemental resource is external to ELD Standards documents. Its primary purpose is to illustrate what students can do at each English language proficiency level independent of other levels.*

Appendix C

Theoretical Foundations of the WIDA ELD Standards, 2020 Edition

Contextual Rationale for the Development of the 2020 Edition

The theoretical underpinnings of WIDA English Language Development (ELD) Standards, 2020 Edition, remain connected to four big ideas that have propelled WIDA forward since its inaugural edition in 2004: (1) Optimization of equitable opportunity and access, (2) Integration of content and language, (3) Collaboration among stakeholders, and (4) Functional approaches to language development.

Since the 2012 Amplification of the WIDA ELD Standards, however, the U.S. educational terrain has changed substantively. Several years have passed since the adoption of new state academic content standards, providing educators with time to build familiarity with the performance expectations, disciplinary shifts, and 21st century skills within these standards. Policy has shifted as well, as states strive to meet requirements under the latest iteration of the Elementary and Secondary School Act, the *Every Student Succeeds Act (ESSA) of 2015*.

Even as general educators' familiarity with academic content standards increases, many educators remain uncertain of how best to support multilingual learners' access to academic content standards. As a result, educators may resort to approaches that limit, rather than foster, multilingual learners' opportunities to learn how to use language and literacy resources for a range of purposes, audiences, and disciplinary situations (Walqui & Bunch, 2020). A promising approach based on genre theory, provides educators with socio-cultural resources to explicitly teach language in a way that enhances learning in disciplinary contexts (Brisk, 2015; Coffin, 2006; Derewianka & Jones, 2016; Gebhard, 2019; Gibbons, 2015).

Therefore, in an effort to address recent changes in the educational terrain, while remaining relevant to an increasingly diverse range of stakeholders, WIDA has used the development of the 2020 Edition as an opportunity to clarify, streamline, and renew the theoretical foundations of the WIDA ELD Standards Framework.

The remaining sections of this appendix are divided into three sections:

- I. The first section provides an overview of theoretical framing that permeates the big ideas in the 2020 Edition of the WIDA ELD Standards
- II. The second section provides background on the design parameters that shaped how the big ideas were carried forward into the WIDA ELD Standards Framework (that is, the four components that provide explicit representations of the WIDA ELD Standards)
- III. The third section provides information on the theories and research that informed the development of each of the four components in the WIDA ELD Standards Framework

I. Big Ideas that Permeate the 2020 Edition of the WIDA ELD Standards

ELD Standards provide a lever for change to advance educational equity for historically disadvantaged students (American Educational Research Association [AERA], American Psychological Association [APA], and National Council on Measurement in Education [NCME], 2014). The four big ideas remain the cornerstone of changes to be advanced in the WIDA ELD Standards, 2020 Edition:

1. Equitable opportunity and access

For more than a decade, concerns about student achievement have resulted in efforts to improve student opportunity to learn (OTL) (AERA, APA, & NCME, 2014). Researchers have worked to expand general education OTL models to include linguistic and cultural dimensions impacting multilingual learners. A well-received series of studies (summarized in Aguirre-Muñoz & Amabisca, 2010) found that explicit instruction of academic language has a stronger, positive impact on EL academic performance than instruction that adheres to the conventional wisdom of making content comprehensible (e.g., Krashen & Terrell, 1983).

Moreover, while some may view lack of success in schooling as a problem that originates from *within* the child, it is important to examine how educational systems might create the conditions that support development of academic language and literacy (Escamilla, 2015). Multilingual learners bring linguistic, cultural, experiential, and social and emotional funds of knowledge (González, Moll, & Amanti, 2005) which they can access and enact, especially when taught through culturally sustaining pedagogy (Paris, 2012). Multilingual learners' exposure to and knowledge of multiple languages and cultures affords these students metalinguistic, metacultural and metacognitive awareness (Bialystok, 2011; Escamilla, Hopewell, Butvilofsky, Sparrow, Soltero-González, Ruiz-Figueroa, & Escamilla, 2013). A commitment to an assets-based approach is essential for multilingual learners in flourishing in school and beyond (Grant, 2012).

2. Integration of content and language

The convergence of academic language use and content had been introduced to language education and supported in the literature since the 1980s (Mohan, 1986; Bailey & Butler, 2003; Gottlieb, 2003, among others), yet their integration was not visible in ELD standards until WIDA's inaugural edition in 2004. WIDA's positioning of its standards has been situated in a long-term evolution of constructs influencing the design of ELD standards: In the 1980s, language teaching began to co-exist with content-based instruction; by the 2000s academic language use became infused in content areas; and today, there is a movement toward unity of language and content (Gottlieb, 2016). As a result, the language-to-content relationship in ELD standards has grown more intertwined and more coherent over the years.

The tighter integration of language has challenged the traditional separation of language from other semiotic resources (Kress & van Leeuwen, 2001). The 2020 Edition integrates language and multimodal communication, defining *text* as spoken, written, and multimodal (Choi & Yi, 2015; Jewitt, 2008; van Lier, 2004; Zwiers & Crawford, 2011).

3. Collaboration among stakeholders

As content and language teachers work together to plan and deliver standards-based instruction, they support one another, share unique fields of expertise, and take collective responsibility for the success of multilingual learners (Honigsfeld & Dove, 2011). However, this collaboration may not take

place if language specialists are seen as itinerant workers with the sole responsibility for multilingual learners' language development (Valdés, Kibler, & Walqui, 2014).

When ideally configured, federal, state, and local levels of educators can be organized to provide multi-level systems of support and to promote collective responsibility and collaboration for the success of multilingual learners. This collaboration is important, because language development occurs in tandem with content area learning and plays an important role in academic achievement (Boals, Hakuta, & Blair, 2015; Bailey, 2013).

4. A functional approach to language development

The 2020 Edition renews and deepens WIDA's dedication to functional approaches to language development, informed by Systemic Functional Linguistics (Halliday & Matthiessen, 2004). In this theoretical tradition, language is defined as a resource for making meaning rather than as a set of rules for ordering structures. As such, functional approach portrays language as a system of choices - influenced by the context of culture and situation (Eggins, 2004) and language development becomes more than a linear process of increasingly accurate structures, but as an expansion of what multilingual learners can do with language in a diversity of contexts that grow through the years of schooling (Christie & Derewianka, 2008). In other words, language development focuses on how language is used for particular purposes, with particular audiences, and in particular sociocultural contexts, rather than viewing language as a collection of isolated grammatical forms.

In the 2020 Edition, greater attention is directed to making the language in content visible and, vice versa, towards the manner in which language development is sensitive to context. That is, language development is considered an interactive social process whereby multilingual learners develop control over increasing ranges of registers and genres that are shaped by a series of factors (Hammond & Gibbons, 2005). In this sense, language offers a dynamic set of tools that can be used in the service of learning disciplinary concepts and practices (Schleppegrell, 2013).

The next section of the paper details how the theoretical framing in the big ideas has been operationalized in the four components of the WIDA ELD Standards Framework, the 2020 Edition and additional theoretical bases for their design. It begins with an explanation of the factors in federal legislation and evidence-centered design that also have afforded particular design choices.

II. Design Parameters that Shaped How the Big Ideas were Carried into the WIDA ELD Standards Framework

The design of the four components of in the 2020 Edition of the WIDA ELD Standards Framework has been shaped to meet ESSA-related peer review requirements (U.S. Department of Education, 2018) [outlined in greater detail in Appendix E of this document].

Yet meeting peer review requirements is not the only purpose for the design of these four components. The architecture built into every single set of state ELD standards in the United States enacts a particular theory of how to set up its evidentiary argument about student performance (AERA, APA, & NCME, 2014).

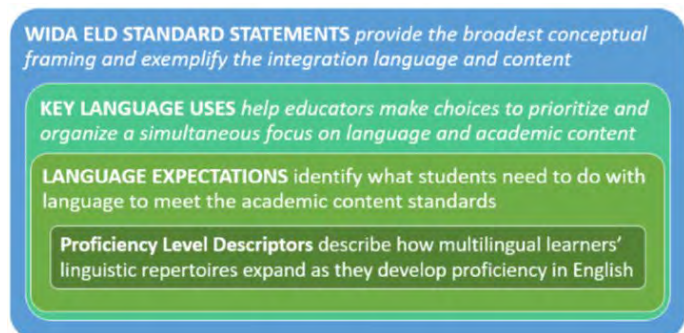


Figure 1. Four Components of the WIDA ELD Standards Framework

Using an evidenced-centered design approach (Mislevy, Steinberg, & Almond, 2003) and an Assessment Use Argument (Bachman & Palmer, 2010; Kim, MacGregor, & Cook, 2018), the four components of the WIDA ELD Standards Framework have been carefully designed to offer an explicit representation of the WIDA Standards. In doing so, a more explicit set of claims can be created about what each multilingual learner knows and can do. Evidence to either support (or refute) these claims can then be gathered through an associated assessment (Mislevy, Almond, & Lukas, 2003) – in other words, through *ACCESS for ELLs*.

Most importantly, the 2020 ELD Standards Framework has been designed to ensure the four components are consistent with the ones used in the previous two editions of the WIDA ELD Standards (e.g., WIDA, 2007, 2012) and meet ESSA peer review requirements. In other words, the core interpretations of student performance, especially those established during 2016 Standards Setting (Cook & MacGregor, 2017), are not changing, but are being conveyed using equivalent, yet more explicit descriptions (Christopherson & Webb, 2017).

III. Theoretical Underpinnings of the Four Components in the WIDA ELD Standards Framework

The final portion of this appendix outlines additional theories and research that informed each of the four components in the WIDA ELD Standards Framework. The big ideas, mentioned in the first section, are also infused throughout the ELD Standards Framework.

The Five ELD Standards Statements

As noted previously, since 2004, the five WIDA ELD Standard statements have emphasized the importance of providing multilingual learners with opportunities to understand how language works in the context of content area instruction (Bailey & Butler, 2003; Fang & Schleppegrell, 2008; Gottlieb, 2003; Mohan, 1986; Mohan, Leung, & Davison, 2001; Scarcella, 2003; Schleppegrell, 2004). The

abbreviations of the five standards have been shortened to emphasize the message that language is used *for* learning (Schleppegrell, 2013) and as a tool for deepening student engagement in disciplinary learning (Valdés, Kibler, & Walqui, 2014).

In the 2020 Edition, Standard 1 (the Language for Social and Instructional Purposes) is embedded throughout the four other standards. For example, this means that everyday language (which might be predominant in student performance during earlier levels) should be seen as part of, rather than separate from academic language (May, 2014). The contents of Standard 1 have been reconfigured to emphasize that language, social-emotional, and cognitive development are interrelated processes that contribute to students' success in school and beyond (Dusenbury, Weissberg, Goren, & Domitrovich, 2014).

Use of an expanded view of academic language is an important step in overcoming the tendency to perceive multilingual learners as if they were failed native speakers, rather than as students who are emergent bilinguals and have cognitive and linguistic practices that may differ from monolinguals (May, 2014; Ortega, 2014; Valdés, Kibler, & Walqui, 2014) or to perceive multilingual learners' cultural differences as deficits, devaluing the “funds of knowledge” found in individual, home, and community strengths and resources (González, Moll, & Amanti, 2005).

The “multilingual turn” encourages educators to view multilinguals not just as *learners of language* in comparison to a monolingual benchmark, but to value multilinguals as *language users* (Cook, 2003) “who have the ability to select, adapt, negotiate, and use a range of linguistic resources that are appropriate in the context” (Mahboob & Dutcher, 2014, p. 117). The belief in multiple, multilingual competencies and an expanded view of language proficiency are reflected in the choice to update the name of the *Key Uses for academic language* (WIDA, 2014) to the *Key Language Uses* in the 2020 Edition.

The Key Language Uses

The Key Language Uses highlight the context for language use by focusing on *purpose* as one of the main variables for shaping language choices. In doing so, educator attention moves away from the word or sentence level of language development to focus on *genre* (Martin & Rose, 2007). Genre approaches offer an explicit and systematic explanation of the ways people use language *for social purposes* (Martin & Rose, 2012; Hyland, 2007). In other words, a *genre* can refer to a culturally-situated, goal-oriented activity that uses recurrent patterns of language — such as ordering coffee, reading an editorial opinion in a newspaper, or instructing someone how to do or make something such as your favorite dish. Individual genres can be organized into broader genre families that use similar, broad patterns — such as informing, recording, explaining, arguing and other groupings (Martin & Rose, 2012).

In the 2020 edition of the WIDA English Language Development Standards, the Key Language Uses have been used to organize the representations of the WIDA standards into the prominent genre families found in academic content standards: Narrate, Inform, Explain, and Argue. Here, the Key Language Uses highlight language use for particular purposes, with particular audiences, and in particular sociocultural contexts. Beginning with the Key Language Uses and carried throughout the other components in the WIDA ELD Standards Framework, the WIDA Standards foreground *purpose for language use* as a key variable among contextual factors that influence language choices.

The 2020 re-orientation of the Key Language Uses to the genre families offers a theoretical approach to language development that is rooted in students' authentic needs to accomplish various social purposes (Standard 1) and academic purposes (Standards 2-5). The selection of Narrate, Inform, Explain, and Argue as the four Key Language Uses [genre families] aligns with de Oliveira's multi-year analyses of genre expectations found in state content standards for English language arts, mathematics, social studies, and science (de Oliveira, Jones, & Smith, 2019).

More deeply, the 2020 re-orientation of the Key Language Uses has been designed to be in theoretical alignment with the Sydney School architecture used in Systemic Functional Linguistics (Derewianka & Jones, 2016; Halliday & Matthiessen, 2004; Halliday & Martin, 1993; Martin, 1985; Martin & Rose, 2012; Rothery, 1989). This re-orientation also fits with American renditions of this Sydney School architecture – contextualized in the U.S. by Schleppegrell (2001; 2004; 2007; 2013) and further developed by many others (e.g., Brisk, 2015; Gebhard, 2019). To reiterate, this approach does not privilege form over function; in actuality, it helps educators to shift from a focus on language forms in isolation to a focus on language forms as part of *functional language use* connected with and in service of learning. In doing so, language use is situated in dynamic local versions that depend on local purposes and contexts (Pennycook, 2010). As student language proficiency increases, it becomes more responsive to the setting of the communicative event—that is, the student's ability to select, adapt, negotiate, and use a range of linguistic resources and meaning in different contexts (Mahboob & Dutcher, 2014).

The Language Expectations

When language progressions focus on only grammatical forms and vocabulary, educators can overfocus on these forms, which in turn limits multilingual learners' opportunities to engage in the active learning processes found in disciplinary practices (Valdés, Kibler, and Walqui, 2014; Lee, 2018). As Lee reports, it is imperative to avoid confounding language proficiency with cognitive expectations of content standards since it “lowers the bar and portrays a deficit view of English Learners” (Lee, 2018, p. 325). To promote high expectations and active engagement for all multilingual learners during complex disciplinary learning activities, the Language Expectations provided to all multilingual learners have been intentionally decoupled from the language development progressions provided in the Proficiency Level Descriptors.

The Language Expectations provide a set of stable (not generative), grade-level cluster representations of the five ELD Standard statements. They are designed to make visible the content-to-language connections for all multilingual learners (Aguirre-Muñoz, & Amabisca, 2010), concomitant with the 2020 Edition's emphasis on high expectations, engaged learning, and improved opportunity to learn for all multilingual learners. The Language Expectations are also intended to make visible the common patterns of language use that are socially construed by the dominant culture, but also can be learned through explicit instruction (Rothery, 1989; Rose & Martin, 2012).

The Language Expectations define specific contexts for language development; they are informed by Critical Systemic Functional Linguistics which emphasizes the need to make visible the hidden genres and patterns of language valued by particular communities (e.g., the differences in what counts as evidence in social studies vs science) (Fang & Schleppegrell, 2008; de Oliveira, 2019; Gebhard, 2019). In doing so, the design of the Language Expectations responds to calls to address the interplay between content and language, showing how the most prominent Key Language Uses are realized within disciplinary contexts (e.g., Gebhard, 2019; Lee, 2018).

Proficiency Level Descriptors

The Proficiency Level Descriptors articulate the grade-level cluster linguistic expectations for each of WIDA's six English language proficiency levels. For the 2020 Edition, the Proficiency Level Descriptors have been expanded, from a single K-12 continuum into six grade-level cluster continua, to create equivalent, yet more explicit, descriptions of the 2012 Performance Definitions.

Because language is viewed as a system of interlocking choices (Halliday, 1994), the WIDA Proficiency Level Descriptors are designed to be used with the Language Expectations in a way that highlights language development, not as fixed, but as dynamically adaptive to its surrounding environment, a view that is complementary to broader socio-cultural views of language development (e.g., Atkinson, 2011; Douglas Fir Group, 2016).

The Proficiency Level Descriptors take a multi-dimensional view of language (Degand & Simon, 2009), focusing attention on how text is a unit of meaning and not a string of sentences (Halliday & Matthiessen, 2004) and how sentence, and word/phrase dimensions contribute to meaning making in the discourse dimension (Martin & Rose, 2007).

The wording found in the Proficiency Level Descriptors themselves does include reference to a socio-cultural stance to language development by examining how students are adapting language (dynamically) to its surrounding environment to fit purpose, audience, roles & identities, and situations (Atkinson, 2011; Douglas Fir Group, 2016). The descriptors also examine how students' linguistic repertoires expand and become increasingly precise as they move from concrete to abstract contexts [along the mode continuum] (Martin, 1985).

The end-of-level targets in the PLD progressions have been cross-referenced to the WIDA Performance Definitions, Interpretive Rubrics for Speaking and Writing and a range of measurement tools and scales used with ACCESS for ELLs, to the *Common EL Definition Project Reference Proficiency Level Descriptors* (Linquanti, Cook, Bailey, & MacDonald, 2016) and the 2018 descriptors in the Common European Framework (CEFR) (Council of Europe, 2018).

The PLDs provide trajectories with typical language development targets, organized by grade-level cluster (e.g., Bailey & Heritage, 2014; Cook & MacDonald, 2012); yet rather than focusing on a static sequence in which language develops (e.g., Krashen & Terrell, 1983), the use of end-of-level targets within each descriptor is designed to imply that students may take different paths within each level to arrive at that end-of-level destination.

Table 1. Research base upon in WIDA PLDs

Criteria		Focus on . . .	Literature Base
Discourse	Organization of language	How language is organized to fulfill communicative purpose(s) and additional adjustments to language based on topic, participants' identities and social roles, audience, and situation	Brisk (2014); Derewianka & Jones (2016); Gebhard (2019); Humphrey, Droga & Feez, (2012)
	Cohesion of language	How language connected within and across sentences and discourse using a range of cohesive devices	Halliday & Matthiessen (2004); Johnson (2017); Fang (2016)
	Density of language	How important information in noun groups is expanded or contracted	Fang (2011; 2020); Fang & Park (2019); Halliday & Matthiessen (2004); de Oliveira & Schleppegrell (2015)
	Amount of language	How overall linguistic complexity progressively increases in discourse	Pienneman (1998; 2005)
Sentence	Grammatical complexity of language	How sentence patterns vary and expand from simple to complex, with a focus on verb forms and different combinations of clauses.	Derewianka (2011); Halliday & Matthiessen, (2004); Humphrey, Droga & Feez, (2012)
Word/Phrase	Precision of language	How everyday, general, and disciplinary language more precisely conveys a range of concrete-to-abstract contexts.	Gibbons (2015); Hiebert (2009); Martin (1985); Uccelli, Barr, Dobbs, Phillips Galloway, Meneses, & Sanchez (2015)

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Appendix D

Proficiency Level Descriptors for Grade-level Clusters K, 1, 2-3, 4-5, 6-8, and 9-12

The Proficiency Level Descriptors define how students might use and understand language for each of six levels of language proficiency- from Entering through Reaching. Present in sociocultural contexts, the Proficiency Level Descriptors are

- Organized around interpretive and expressive modes of communication across the ELD language development standards
- A progression of language use from concrete, shared contexts to increasing abstract, distant contexts
- Reflective of multilingual learners' language development at grade-level clusters that correspond to those of WIDA English language proficiency test, ACCESS for ELLs
- Designed for use with activities that target the WIDA Language Expectations for each grade-level cluster.

In reading and applying the Proficiency Level Descriptors, it is important to keep in mind that

- Each proficiency level includes and builds on previous levels
- Language development is not always straightforward and linear; it is contingent on the sociocultural context for communication that includes familiarity with the situation, audience, and topic
- Multilingual learners may take various pathways to reach the end-of-level descriptors
- As multilingual learners grow in English language proficiency, their effective use of language across discourse, sentence, and word/ phrase dimensions increases accordingly

The choice of scaffolding and multimodal communication (e.g., visual, auditory, tactile, kinesthetic) for multilingual learners, including those with disabilities, is built into the Proficiency Level Descriptors. Present across all levels of language proficiency, scaffolding and resources for multimodal communication should be based on the communicative purpose and the students' familiarity with the situation.

The six sets of Proficiency Level Descriptors from Kindergarten through high school follow. Although derived from their predecessor, the K-12 Performance Definitions, these descriptors have been designed to reflect the range of multilingual learners' development within each grade-level cluster.



Interpretive Communication Modes

KINDERGARTEN

WIDA Proficiency Level Descriptors for Listening, Reading, and Viewing

The WIDA Proficiency Level Descriptors outline an interlocking set of criteria to use when measuring multilingual learner language performance in activities that target the WIDA Language Expectations. Each language proficiency level is cumulative, building on previous levels (e.g., PL 4 = PL1 + PL 2 + PL3 + PL4).

Dimension	End of Level 2 Emerging			End of Level 4 Expanding			Level 6 Reaching		
Discourse									
Organization of language	Text that conveys a narrow range of common social purposes or instructional routines			Text that conveys an increasing range of common social purposes or instructional routines			Text that conveys a clearly signaled purpose; with relationships explicitly arranged in a short, sequence (with a few details)		
Cohesion of language	Ideas linked by repeated words			Ideas linked by synonyms			Ideas linked by pronoun substitution; contrasting connectors (however, even though)		
Density of language	Explicitly signaled information found in simple noun groups with an adjective added before noun			Explicitly signaled information found in simple noun groups with a few adjectives and adverbs added before noun			Important information found in expanded noun groups with adjectives and adverbs added before or after nouns		
Amount of language	Word/phrases and clauses			A variety of short sentences			A series of sentences		
Sentence									
Grammatical complexity of language	Simple phrasal patterns or memorized chunks of language			Simple sentences with subjects, active verbs, and direct objects			Simple sentences with auxiliary verbs and prepositional phrases		
Word/Phrase									
Precision of language	High frequency everyday, general, and disciplinary language			A narrow range of everyday language, including irregular forms			An increasing range of general language, including collocations and cognates		

Expressive Communication Modes

WIDA Proficiency Level Descriptors for Speaking, Writing, and Representing

Dimension	End of Level 2 Emerging			End of Level 4 Expanding		Level 6 Reaching	
Discourse Organization of language	Text that conveys an extremely narrow range of common social purposes or instructional routines			Text that conveys an increasing range of common social purposes or instructional routines		Text that conveys emerging organization by purpose	
Cohesion of language	Ideas linked by related representations (pictures) with some labels			Ideas linked by repeated words		Ideas linked by antonyms	
Density of language	Explicitly signaled information found in isolated common noun			Important information easily found in simple noun group with possessive adjective added before noun		Important information found in expanded noun groups with expanded pre-modifying adjective groups	
Amount of language	Limited expression			Isolated word/phrases and clauses		A short sentence	
Sentence Grammatical complexity of language	Isolated or memorized chunks of language; little or no control			Simple phrases with subjects and verbs; little or no control		Simple sentences with subjects, active verbs, and direct objects; limited control	
Word/Phrase Precision of language	Highest frequency everyday, general, and disciplinary language in concrete, immediate contexts			A narrow range of everyday and general language in concrete, immediate contexts		An increasing range of everyday and general language including irregular forms	

Interpretive Communication Modes

WIDA Proficiency Level Descriptors for Listening, Reading, and Viewing

The WIDA Proficiency Level Descriptors outline an interlocking set of criteria to use when measuring multilingual learner language performance in activities that target the WIDA Language Expectations. Each language proficiency level is cumulative, building on previous levels (e.g., PL 4 = PL1 + PL 2 + PL3 + PL4).

Dimension	End of Level 1 Entering	End of Level 2 Emerging	End of Level 3 Developing	End of Level 4 Expanding	End of Level 5 Bridging	Level 6 Reaching
As multilingual learners near the END of each proficiency level, and with appropriate scaffolding and multimodal communication, they will make meaning by processing:						
Discourse Organization of language	Text that explicitly signals a narrow range of common social purposes or instructional routines	Text that conveys an increasing range of common social purposes or instructional routines	Text that conveys a wide range of common social purposes or instructional routines	Text that conveys a clearly signaled purpose; with relationships explicitly arranged in a short sequence	Text that conveys a clearly signaled purpose; with relationships explicitly arranged in a short sequence (with a few details)	Text that conveys a clearly signaled purpose; with relationships extended into a longer sequence
Cohesion of language	Ideas linked by repeated words	Ideas linked by synonyms	Ideas linked by closely associated words; basic connectors	Ideas linked by common sequencing connectors	Ideas linked by pronoun substitution; contrasting connectors	Ideas linked by an umbrella (superordinate) term; common comparative connectors
Density of language	Explicitly signaled information found in simple noun group with an adjective added before noun	Explicitly signaled information found in simple noun group with a few adjectives or adverbs added before noun	Important information found in simple noun group with an expanded adjective group added before noun	Important information found in simple noun groups with prepositional phrase added after noun	Important information found in expanded noun groups with relative clauses added before or after nouns	Important information found in expanded noun groups with relative clauses added after nouns
Amount of language	Word/phrases and clauses	A variety of short sentences	Short, predictable sentences	An increasing variety of short sentences	A series of sentences	Short, connected discourse
Sentence Grammatical complexity of language	Simple phrasal patterns or memorized chunks of language	Simple sentences with subjects, active verbs, and direct objects	Simple sentences	Simple sentences with passive structures	Complex sentences beginning with a dependent clause	Complex sentences with relative clauses, sometimes omitting the connector word
Word/Phrase Precision of language	High frequency everyday, general, disciplinary language in concrete, immediate contexts	A narrow range of everyday language, including irregular forms in concrete, immediate contexts	An increasing range of everyday language, including simple contrasting pairs of words	A narrow range of general language, including an additional, increasingly abstract meanings [to everyday language]	An increasing range of general language, including collocations and cognates	A wide range of general and disciplinary language, including new words constructed from prefixes, suffixes, and other word structures

Expressive Communication Modes

WIDA Proficiency Level Descriptors for Speaking, Writing, and Representing

Dimension	End of Level 1 Entering	End of Level 2 Emerging	End of Level 3 Developing	End of Level 4 Expanding	End of Level 5 Bridging	Level 6 Reaching
	As multilingual learners near the END of each proficiency level, and with appropriate scaffolding and multimodal communication, they will make meaning by processing:					
Discourse Organization of language	Text that conveys an extremely narrow range of common social purposes or instructional routines	Text that conveys a narrow range of common social purposes or instructional routines	Text that conveys an increasing range of common social purposes or instructional routines	Text that conveys a wide range of common social purposes or instructional routines	Text that more consistently conveys a clearly signaled purpose; with relationships arranged in a short sequence	Text that more consistently conveys a clearly signaled purpose; with relationships extended into a longer sequence
Cohesion of language	Ideas linked by common representations	Ideas linked by simple demonstratives (this, that)	Ideas linked by antonyms	Ideas linked by sequencing connectors	Ideas linked by pronoun substitution; contrasting connectors	Ideas linked by an umbrella (superordinate) term; common comparative connectors
Density of language	Explicitly signaled information found in an isolated common noun	Explicitly signaled information found in simple noun group with articles (the, a)	Important information found in simple noun group with adjectives and adverbs added before or after noun	Information easily found in simple noun group; prepositional phrases added after noun	Information easily found in simple noun group;; adjectives added before or after noun	Important information found in simple noun groups; increasing range of prepositional phrases
Amount of language	Isolated word/phrases and clauses	Word/phrases and clauses	A few short sentences	One-to-two complete sentences	An increasing variety of short sentences	A series of sentences
Sentence Grammatical complexity of language	Isolated or memorized chunks of language; little or no control	Isolated or memorized chunks of language or simple phrasal patterns; little or no control	Simple sentences with basic connectors between noun groups or between verb groups; limited control	Simple sentences with adverbs; variable control	Simple sentences with two-word verbs; occasional control	Simple sentences with auxiliary verbs and prepositional phrases; with control
Word/Phrase Precision of language	Highest frequency everyday, general, and disciplinary language in concrete, immediate contexts	A narrow range of everyday and general language in concrete, immediate contexts	An increasing range of everyday and general language including irregular forms	An increasing range of general language, including an additional meaning [to everyday language]	A wider range of general language, including collocations [commonly paired words] and cognates	An increasing range of disciplinary language, including words and phrases with a common schema

The WIDA Proficiency Level Descriptors outline an interlocking set of criteria to use when measuring multilingual learner language performance in activities that target the WIDA Language Expectations. Each language proficiency level is cumulative, building on previous levels (e.g., PL 4 = PL1 + PL 2 + PL3 + PL4).

Dimension	End of Level 1 Entering	End of Level 2 Emerging	End of Level 3 Developing	End of Level 4 Expanding	End of Level 5 Bridging	Level 6 Reaching
	As multilingual learners near the END of each proficiency level, and with appropriate scaffolding and multimodal communication, they will make meaning by processing:					
Discourse Organization of language	Text that conveys an increasing range of common social purposes or instructional routines	Text that conveys a clearly signaled purpose; with relationships explicitly arranged in a short sequence	Text that conveys a clearly signaled purpose; with relationships explicitly arranged in a short, sequence (with a few details)	Text that conveys a clearly signaled purpose; with relationships extended into a longer sequence	Text that conveys a clearly signaled purpose; with relationships arranged in an extended sequence	Text that conveys a purpose and clearly signaled perspective; with relationships arranged into extended, detailed sequences
Cohesion of language	Ideas linked by synonyms	Ideas linked by common sequencing connectors	Ideas linked by closely associated words; basic connectors	Ideas linked by pronoun substitution; contrasting connectors	Ideas linked by an umbrella (superordinate) term; common comparative connectors (while, on the other hand)	Ideas linked by an increasing range of adding, contrasting, causal and conceding connectors
Density of language	Explicitly signaled information found in simple noun group with adjective and adverb (very) added before noun	Important information found in simple noun group with prepositional phrase added after noun	Important information found in expanded noun groups with adjectives and adverbs added before or after nouns	Important information found in expanded noun groups with relative clauses added after nouns	Important information found in expanded noun groups with relative clauses added after nouns	Important information conveyed concisely in expanded noun groups
Amount of language	A variety of short sentences	An increasing variety of short sentences	A series of sentences	Short, connected discourse	Short, connected discourse	Short, connected discourse with an increasing variety of sentences
Sentence Grammatical complexity of language	Simple sentences with subjects, active verbs, and direct objects	Simple sentences with comparative structures	Simple sentences with auxiliary verbs and prepositional phrases	Simple sentences with passive structures	Complex sentences beginning with a dependent clause	Complex sentences with relative clauses, sometimes omitting the connector word
Word/Phrase Precision of language	A narrow range of everyday, general, and disciplinary language, including irregular forms in concrete, immediate contexts	A narrow range of general language, including an additional, increasingly abstract meanings [to everyday language]	An increasing range of general language, including collocations and cognates	An increasing range of general language, including new words constructed from prefixes, suffixes, and other word structures	A wide range of general language, including words and phrases with a common schema	A narrow range of disciplinary language, including multiple meanings

Dimension	End of Level 1 Entering	End of Level 2 Emerging	End of Level 3 Developing	End of Level 4 Expanding	End of Level 5 Bridging	Level 6 Reaching
	As multilingual learners near the END of each proficiency level, and with appropriate scaffolding and multimodal communication, they will make meaning by processing:					
Discourse Organization of language	Text that conveys an extremely narrow range of common social purposes or instructional routines	Text that conveys a wide range of common social purposes or instructional routines	Text that inconsistently conveys a clearly signaled purpose; with few connections made within a short sequence	Text that more consistently conveys a disciplinary topic for a clearly signaled purpose; with relationships arranged in a short, sequence (with a few details)	Text that more consistently conveys a purpose; with relationships arranged in an extended sequence	Text that consistently conveys a purpose and clearly signaled perspective; with relationships arranged into extended, detailed sequences
Cohesion of language	Ideas linked by common representations	Ideas linked by synonyms	Ideas linked by closely associated words; basic connectors	Ideas linked by pronoun substitution; contrasting connectors	Ideas linked by an umbrella (superordinate) term; common comparative connectors	Ideas linked by an increasing range of adding, contrasting, causal, and conceding connectors
Density of language	Explicitly signaled information found in an isolated common noun	Important information easily found in simple noun group with classifying adjectives added before noun	Information easily found in simple noun groups; relative pronouns added after noun group	Information easily found in simple noun groups; adjectives added before or after nouns	Important information found in simple noun groups; increasing range of prepositional phrases	Important information found in expanded noun groups with relative clauses added after nouns
Amount of language	Limited expression	Isolated word/phrases and clauses	A variety of short sentences	A series of sentences	A wide variety of short sentences	Multiple series of parallel sentences
Sentence Grammatical complexity of language	Isolated or memorized chunks of language; with no control	Isolated or memorized chunks of language or simple phrasal patterns; with limited control	Simple sentences with basic auxiliary verbs; with variable control	Simple sentences with auxiliary verbs; with variable control	Simple sentences with auxiliary verbs and prepositional phrases; with occasional control	Complex sentences with passive structures; with control
Word/Phrase Precision of language	Highest frequency everyday, general, and disciplinary language in concrete, immediate contexts	A narrow range of everyday and general language used routinely across playground and classroom contexts	An increasing range of general language, including simple word families	A wide range of general language, including collocations and cognates	A narrow range of disciplinary language, including words and phrases with a common schema	An increasing range of disciplinary language including multiple meanings

The WIDA Proficiency Level Descriptors outline an interlocking set of criteria to use when measuring multilingual learner language performance in activities that target the WIDA Language Expectations. Each language proficiency level is cumulative, building on previous levels (e.g., PL 4 = PL1 + PL 2 + PL3 + PL4).

Dimension	End of Level 1 Entering	End of Level 2 Emerging	End of Level 3 Developing	End of Level 4 Expanding	End of Level 5 Bridging	Level 6 Reaching
	As multilingual learners near the END of each proficiency level, and with appropriate scaffolding and multimodal communication, they will make meaning by processing:					
Discourse Organization of language	Text that conveys a wide range of common social purposes or instructional routines	Text that conveys a clearly signaled purpose; with relationships explicitly arranged in a short, sequence (with a few details)	Text that conveys a clearly signaled purpose; with relationships arranged in an extended sequence	Text that conveys a purpose and clearly signaled perspective; with relationships arranged into extended, detailed sequences	Text that conveys a purpose and clearly signaled perspective; with relationships arranged in increasingly extended sequences	Text that conveys several, integrated purposes and perspectives; with relationships arranged in long, elaborated sequences
Cohesion of language	Ideas linked by closely associated words; basic connectors	Ideas linked by pronoun substitution; contrasting connections	Ideas linked by an umbrella (superordinate) term; common comparative connectors (while, on the other hand)	Ideas linked by an increasing range of adding, contrasting, causal and conceding connectors	Relationships among ideas signaled by an increasing range of cohesive devices	Ideas that have been condensed and collapsed into abstract themes and concepts using an increasing range of cohesive devices
Density of language	Important information found in simple noun group with an adjective group added before noun	Important information found in expanded noun groups with adjectives and adverbs added before or after nouns	Important information found in expanded noun groups with relative clauses added after nouns	Important information conveyed concisely in expanded noun groups	Important information found in expanded noun groups; increasing complexity of modifiers added before or after nouns	Important information compacted into abstract nouns (nominalizations)
Amount of language	Short, predictable sentences	A series of sentences	Short, connected discourse	Short, connected discourse with an increasing variety of sentences	Longer stretches of connected discourse with multiple, varied sentences	An increasing variety of expanded or concise discourse
Sentence Grammatical complexity of language	Simple sentences	Complex sentences beginning with a dependent clause	Complex sentences with passive structures	Complex sentences with a relative clause that contains an infinitive	Complex sentences with passives clauses that use infinitives	Complex sentences with few (or no) conjunctions due to use of ellipsis or nominalization
Word/Phrase Precision of language	A narrow range of everyday, general, and disciplinary language in concrete, immediate contexts	An increasing range of everyday and general language, including simple contrasting pairs of words	A wide range of everyday and general language, including words and phrases with a common schema	A narrow range of disciplinary language, including multiple meanings	An increasing range of disciplinary language, including an increasing range of specialized terminology; adverbials, adjectives showing different degrees of possibility	A wide range of disciplinary language, including an increasing range of technical terms and idiomatic expressions

Expressive Communication Modes

WIDA Proficiency Level Descriptors for Speaking, Writing, and Representing

Dimension	End of Level 1 Entering	End of Level 2 Emerging	End of Level 3 Developing	End of Level 4 Expanding	End of Level 5 Bridging	Level 6 Reaching
As multilingual learners near the END of each proficiency level, and with appropriate scaffolding and multimodal communication, they will make meaning by processing:						
Discourse Organization of language	Text that conveys a narrow range of common social purposes or instructional routines	Text that conveys an increasing range of common social purposes or instructional routines	Text that more consistently conveys a clearly signaled purpose; with relationships arranged in a short sequence	Text that more consistently conveys a clearly signaled purpose; with relationships extended into a longer sequence	Text that consistently conveys a purpose and clearly signaled perspective; with relationships arranged into extended, detailed sequences	Text that consistently conveys several, integrated purposes and perspectives; with relationships appropriately arranged in long, elaborated sequences
Cohesion of language	Ideas linked by simple demonstratives (this, that)	Ideas linked by repeated words	Ideas linked by sequencing connectors	Ideas linked by pronoun substitution; contrasting connectors	Ideas linked by an increasing range of adding, contrasting, causal, and conceding connectors	Relationships among ideas signaled by an increasing range of cohesive devices
Density of language	Explicitly signaled information found in simple noun group with articles (the, a)	Important information easily found in simple noun group with possessive adjective added before noun	Information easily found in simple noun group; prepositional phrase added after noun	Information easily found in simple noun group; adjectives added before or after noun	Important information found in expanded noun groups with relative clauses added after nouns	Important information found in expanded noun groups; increasing complexity of modifiers added before or after nouns
Amount of language	Emerging expression	Word/phrases and clauses	One-to-two complete sentences	An increasing variety of short sentences	Multiple series of parallel sentences	Short, connected discourse
Sentence Grammatical complexity of language	Isolated or memorized chunks of language or simple phrasal patterns; no control	Simple phrasal patterns; limited control	Simple sentences with adverbs; occasional control	Simple sentences with two-word verbs; occasional control	Complex sentences with passive structures	Complex sentences beginning with a dependent clause
Word/Phrase Precision of language	High frequency everyday, general, and disciplinary language in concrete, immediate contexts	A narrow range of everyday and general language in concrete, immediate contexts	An increasing range of general language, including an additional meaning [to everyday language]	A wider range of general language, including collocations [<i>commonly paired words</i>] and cognates	A narrow range of disciplinary language including multiple meanings	An increasing range of disciplinary language, including an increasing range of specialized terminology; adverbials, adjectives showing different degrees of possibility

Interpretive Communication Modes

WIDA Proficiency Level Descriptors for Listening, Reading, and Viewing

The WIDA Proficiency Level Descriptors outline an interlocking set of criteria to use when measuring multilingual learner language performance in activities that target the WIDA Language Expectations. Each language proficiency level is cumulative, building on previous levels (e.g., PL 4 = PL1 + PL 2 + PL3 + PL4).

Dimension	End of Level 1 Entering	End of Level 2 Emerging	End of Level 3 Developing	End of Level 4 Expanding	End of Level 5 Bridging	Level 6 Reaching
	As multilingual learners near the END of each proficiency level, and with appropriate scaffolding and multimodal communication, they will make meaning by processing:					
Discourse Organization of language	Text that conveys a clearly signaled purpose; with relationships explicitly arranged in a short sequence	Text that conveys a clearly signaled purpose; with relationships extended into a longer sequence	Text that conveys a purpose and clearly signaled perspective; with relationships arranged into extended, detailed sequences	Text that conveys a purpose and clearly signaled perspective; with relationships arranged in increasingly extended sequences	Text that conveys several integrated purposes and perspectives; with relationships arranged in long, elaborated sequences	Text that conveys a variety of integrated purposes, perspectives, and situations; with relationships arranged in elaborated or condensed sequences
Cohesion of language	Ideas linked by common sequencing connectors	Ideas linked by an umbrella (superordinate) term; comparative connectors	Ideas linked by an increasing range of adding, contrasting, causal and conceding connectors	Relationships among ideas signaled by an increasing range of cohesive devices	Ideas condensed into abstract themes and concepts using an increasing range of cohesive devices	Ideas that have been arranged in given and new patterns to build information sequencing
Density of language	Important information found in simple noun group with prepositional phrase added after noun	Important information found in expanded noun groups; relative clauses added after nouns	Important information conveyed concisely in expanded noun groups	Important information found in expanded noun groups; increasing complexity of modifiers added before or after nouns	Important information compacted into abstract nouns (nominalizations)	Important information found in expanded noun and verb groups with a wide complexity of pre- and post- modifiers
Amount of language	An increasing variety of short sentences	Short, connected discourse	Short, connected discourse with an increasing variety of sentences	Longer stretches of connected discourse with multiple, varied sentences	An increasing variety of expanded or concise discourse	A wide variety of expanded or concise discourse
Sentence Grammatical complexity of language	Simple sentences with auxiliary verbs	Complex sentences beginning with a dependent clause	Complex sentences with passive structures	Complex sentences with a relative clause that contains an infinitive	Complex sentences with passives clauses that use infinitives	Complex sentences with few (or no) conjunctions due to use of ellipsis or nominalization
Word/Phrase Precision of language	A narrow range of everyday, general, and disciplinary language, including an additional, increasingly abstract meanings [to everyday language]	An increasing range of everyday and general language, including new words constructed from prefixes, suffixes, and other word structures	A wide range of general language and a narrow range of disciplinary language, including multiple meanings	A narrow range of disciplinary language, including an increased range of specialized terminology; adverbials, adjectives showing different degrees of possibility	An increasing range of disciplinary language, including an increasing range of technical terms and idiomatic expressions	A wide range of disciplinary language, including a wide range of shades of meaning [certainty, likelihood, hedging, connotative meanings, subtle social and cultural references]

Expressive Communication Modes

WIDA Proficiency Level Descriptors for Speaking, Writing, and Representing

Dimension	End of Level 1 Entering	End of Level 2 Emerging	End of Level 3 Developing	End of Level 4 Expanding	End of Level 5 Bridging	Level 6 Reaching
	As multilingual learners near the END of each proficiency level, and with appropriate scaffolding and multimodal communication, they will make meaning by processing:					
Discourse Organization of language	Text that conveys a wide range of common social purposes or instructional routines	Text that conveys emerging organization by purpose	Text that more consistently conveys a disciplinary topic for a clearly signaled purpose; with relationships arranged in a short, sequence (with a few details)	Text that more consistently conveys a purpose; with relationships arranged in an extended sequence	Text that consistently conveys several, integrated purposes and perspectives; with relationships appropriately arranged in long, elaborated sequences	Text that consistently conveys several, integrated purposes and perspectives; with relationships appropriately arranged in long, elaborated sequences
Cohesion of language	Ideas linked by synonyms	Ideas linked by antonyms	Ideas linked by pronoun substitution; contrasting connectors	Ideas linked by an umbrella (superordinate) term; common comparative connectors	Relationships among ideas signaled by an increasing range of cohesive devices	Ideas that have been condensed into abstract themes and concepts using an increasing range of cohesive devices
Density of language	Important information easily found in simple noun group with classifying adjectives added before noun	Important information found in expanded noun groups with expanded pre-modifying adjectival groups	Information easily found in expanded noun groups; adjectives added before or after nouns	Important information found in expanded noun groups; increasing range of prepositional phrases	Important information found in expanded noun groups; increasing complexity of modifiers added before or after nouns	Important information compacted into abstract nouns (nominalizations)
Amount of language	Isolated word/phrases and clauses	A few short sentences	A series of short sentences	A wide variety of short sentences	Short, connected discourse	Short, connected discourse with an increasing variety of sentences
Sentence Grammatical complexity of language	Isolated or memorized chunks of language or simple phrasal patterns; with developing control	Simple sentences with basic connectors between noun groups or between verb groups; with occasional control	Simple sentences with auxiliary verbs; with occasional control	Simple sentences with auxiliary verbs and prepositional phrases; with variable control	Complex sentences with relative clauses, sometimes omitting the connector word; with control	Complex sentences with a relative clause that contains an infinitive; with control
Word/Phrase Precision of language	A narrow range of everyday, general, and disciplinary language used routinely across social and classroom contexts	An increasing range of everyday and general language including irregular forms	A wide range of general language, including collocations and cognates	A narrow range of disciplinary language, including words and phrases with a common schema	An increasing range of disciplinary language, including an increasing range of specialized terminology; adverbials, adjectives showing different degrees of possibility	A wide range of disciplinary language, including technical terms and idiomatic expressions

Interpretive Communication Modes

WIDA Proficiency Level Descriptors for Listening, Reading, and Viewing

The WIDA Proficiency Level Descriptors outline an interlocking set of criteria to use when measuring multilingual learner language performance in activities that target the WIDA Language Expectations. Each language proficiency level is cumulative, building on previous levels (e.g., PL 4 = PL1 + PL 2 + PL3 + PL4).

Dimension	End of Level 1 Entering	End of Level 2 Emerging	End of Level 3 Developing	End of Level 4 Expanding	End of Level 5 Bridging	Level 6 Reaching
	As multilingual learners near the END of each proficiency level, and with appropriate scaffolding and multimodal communication, they will make meaning by processing:					
Discourse Organization of language	Text that conveys a clearly signaled purpose; with relationships explicitly arranged in a short, sequence (with a few details)	Text that conveys a clearly signaled purpose; with relationships arranged in an extended sequence	Text that conveys a purpose and clearly signaled perspective; with relationships arranged in increasingly extended sequences	Text that conveys several, integrated purposes and perspectives; with relationships arranged in long, elaborated sequences	Text that conveys a variety of integrated purposes, perspectives, and situations; with relationships arranged in elaborated or condensed sequences	Text that conveys a wide variety of integrated purposes, perspectives, and situations; with relationships flexibly arranged in a variety of sequences
Cohesion of language	Ideas linked by pronoun substitution; contrasting connectors	Ideas linked by an umbrella (superordinate) term; common comparative connectors	Relationships among ideas signaled by an increasing range of cohesive devices	Ideas that have been condensed and collapsed into abstract themes and concepts using an increasing range of cohesive devices	Ideas that have been arranged in given and new patterns to build information sequencing	Ideas arranged into tightly knit given and new patterns; information sequencing built through expanded noun groups and nominalizations
Density of language	Important information found in expanded noun groups with adjectives and adverbs added before or after nouns	Important information found in expanded noun groups with relative clauses added after nouns	Important information found in expanded noun groups; increasing complexity of modifiers added before or after nouns	Important information compacted into abstract nouns (nominalizations)	Important information found in expanded noun and verb groups with a wide complexity of pre- and post- modifiers	Important information compacted into embedded clauses after expanded noun groups and nominalizations
Amount of language	A series of sentences	Short, connected discourse	Longer stretches of connected discourse with multiple, varied sentences	An increasing variety of expanded or concise discourse	A wide variety of expanded or concise discourse	A wide variety of elaborated or tightly knit discourse
Sentence Grammatical complexity of language	Simple sentences with auxiliary verbs and prepositional phrases	Complex sentences beginning with a dependent clause	Complex sentences with a relative clause that contains an infinitive	Complex sentences with passives clauses that use infinitives	Complex sentences with few (or no) conjunctions due to use of ellipsis or nominalization	Complex sentences with logical connections without explicit use of conjunctions
Word/Phrase Precision of language	A narrow range of everyday, general, and disciplinary language, including collocations and cognates	An increasing range of everyday and general language, including words and phrases with a common schema	A narrow range of disciplinary language, including specialized terminology; adverbials, adjectives showing different degrees of possibility	An increasing range of disciplinary language, including technical terms and idiomatic expressions	A wide range of disciplinary language, including shades of meaning [certainty, likelihood], hedging, connotative meanings	A wide range of disciplinary language with technical and abstract meanings, highly specialized terms, nuance, metaphor, puns, sarcasm

Dimension	End of Level 1 Entering	End of Level 2 Emerging	End of Level 3 Developing	End of Level 4 Expanding	End of Level 5 Bridging	Level 6 Reaching
	As multilingual learners near the END of each proficiency level, and with appropriate scaffolding and multimodal communication, they will make meaning by processing:					
Discourse Organization of language	Text that conveys an increasing range of common social purposes or instructional routines	Text that inconsistently conveys a clearly signaled purpose; with few connections made within a short sequence	Text that more consistently conveys a clearly signaled purpose; with relationships extended into a longer sequence	Text that consistently conveys a purpose and clearly signaled perspectives; with relationships arranged into extended, detailed sequences	Text that consistently conveys several, integrated purposes and perspectives; with relationships appropriately arranged in long, elaborated sequences	Text that effectively conveys a variety of integrated purposes, perspectives, and situations; with relationships arranged in elaborated or condensed sequences
Cohesion of language	Ideas linked by repeated words	Ideas linked by closely associated words; basic connectors	Ideas linked by pronoun substitution; contrasting connectors	Ideas linked by an increasing range of adding, contrasting, causal, and conceding connectors	Ideas that have been condensed into abstract themes and concepts using an increasing range of cohesive devices	Ideas that have been arranged in given and new patterns to build information sequencing
Density of language	Important information easily found in simple noun group with possessive adjectives added before noun	Information easily found in simple noun groups; relative pronoun added after noun	Information easily found in expanded noun groups; adjectives added before or after nouns	Important information found in expanded noun groups with relative clauses added after nouns	Important information compacted into abstract nouns (nominalizations)	Important information found in expanded noun and verb groups with a wide complexity of pre- and post- modifiers
Amount of language	Word/phrases and clauses	A variety of short sentences	An increasing variety of short sentences	Multiple series of parallel sentences	Longer stretches of connected discourse with multiple, varied sentences	An increasing variety of expanded or concise discourse
Sentence Grammatical complexity of language	Simple phrasal patterns; with limited control	Simple sentences with basic auxiliary verb; with occasional control	Simple sentences with two-word verbs; with occasional control	Complex sentences beginning with a dependent clause; with variable control	Complex sentences with a relative clause that contains an infinitive; with control	Complex sentences with few or no conjunctions due to use of ellipsis or nominalization; with control
Word/Phrase Precision of language	A narrow range of everyday, general, and disciplinary language used routinely across social and classroom contexts	An increasing range of general language, including simple word families	A wide range of general language, including collocations [commonly paired words] and cognates	A narrow range of disciplinary language including multiple meanings	An increasing range of disciplinary language, including technical terms and idiomatic expressions	A wide range of disciplinary language, including shades of meaning [certainty, likelihood], hedging, connotative meanings [subtle social and cultural references]



Appendix E

WIDA ELD Standards, 2020 Edition: Meeting ESSA Title 1 Requirements

One use of the WIDA ELD Standards, 2020 Edition is to serve as a policy document. In that capacity, this edition has been carefully crafted to comply with all requirements for language standards under Title I of the Every Student Succeeds Act (ESSA, 2015). Specifically, it addresses the provisions stipulated in the U.S. Department of Education, Assessment Peer Review Submission Index ELP. The figure below outlines how relevant Critical Elements in the Index apply to the 2020 Edition; as a result, all WIDA entities can be confident that the consortium is meeting its legal obligation of language standards and its alignment to assessment.

<i>Critical Element for Peer Review of State English Language Proficiency Assessment Systems</i>	<i>Requirements per ESSA</i>	<i>Response According to WIDA ELD Standards, 2020 Edition</i>
Critical Element 1.1, Provision of ELP Standards for all English Learners, and Critical Element 1.2, Coherent and Progressive ELP Standards that Correspond to the State's Academic Content Standards	The ELP* standards: <ul style="list-style-type: none"> • are derived from the four domains of speaking, listening, reading, and writing; • address the different proficiency levels of ELs; and • align to the State academic content standards 	The 4 domains are subsumed under 2 communication modes- Interpretive (listening, reading, viewing) and Expressive (speaking, writing, and representing). Proficiency Level Descriptors present 6 levels of English language proficiency. Content Summary Tables establish a strong degree of alignment with State academic content standards as do the derivative Key Language Use Distribution Charts .
Critical Element 1.5, Meaningful Consultation in the Development of Challenging State Standards and Assessments	(This requirement does not apply to standards and assessments adopted prior to the passage of ESSA, December 2015)	WIDA designed and adopted its ELP standards in 2004. It has continued to involve all entities in subsequent editions through national surveys, advisory panels, focus groups, SEA subcommittees, and Board meetings.
Critical Element 2.1, Test Design and Development	The State's test design and test development process is well-suited for the content, is technically sound, aligns the assessments to the depth and breadth of the State's ELP standards; to support the development of assessments that are technically sound, measure the depth and breadth of the State's ELP standards.	The Center for Applied Linguistics has been WIDA's partner in its design and development of the English language proficiency assessment, ACCESS, since 2005. The WIDA ELD standards are aligned with their representations in the test specifications that are operationalized in the test.

Critical Element 2.2, Item Development	Assess student English language proficiency based on the State’s ELP standards in terms of content and language processes.	WIDA has always defined English language proficiency as the integration of language and content in its language standards statements, however, it is accentuated in the 2020 edition in the Standards Framework.
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*Since 2012 WIDA has referred to its language standards as ‘language development’ to describe the process across time rather than ‘language proficiency’ that states performance at a point in time.

Appendix F

Correspondence Between Content and Language Standards

Each WIDA ELD standard statement is anchored in and has been derived from corresponding sets of academic content standards that have been designed for the general K-12 student population. This correspondence creates a close tie between language and content for educators. Figure 1A shows the paired WIDA ELD standard and its derivative sets of standards.

Figure 1A Correspondence Between WIDA ELD Standards and State Academic Content Standards

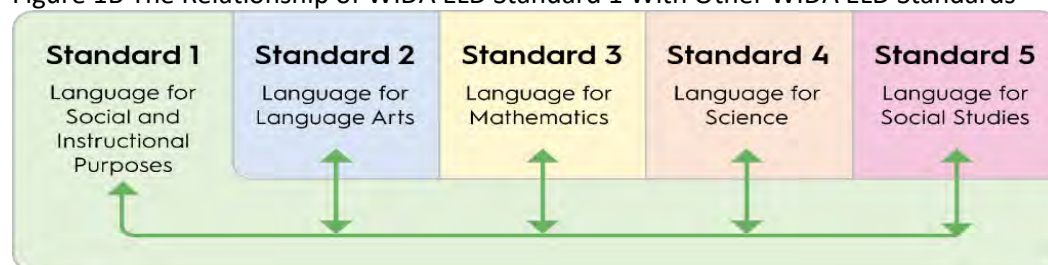
WIDA ELD Standard	ELD Standard 1 Language for Instructional & Social Purposes	ELD Standard 2 Language for Language Arts	ELD Standard 3 Language for Mathematics	ELD Standard 4 Language for Science	ELD Standard 5 Language for Social Studies
Academic Content Standards	Collaborative for Academic, Social, and Emotional Learning Standards	State academic content standards for Language Arts	State academic content standards for Mathematics	Next Generation Science Standards	C3 Framework

Correspondence Between ELD Standard 1 and Disciplinary Standards and Practices

Standard 1, Language for Social and Instructional Purposes, is unique for multilingual learners as it acknowledges the necessary language for navigating school contexts across levels of language proficiency and content areas that are anchored of disciplinary standards and practices.

In the 2020 edition, WIDA recognizes the close ties of the language for Standard 1 with social, emotional, and character-focused “whole child” educational approaches to learning. As educators in every discipline embed important topics related to physical and emotional health and safety, personal development, and/or service across their curriculum, WIDA Standard 1 is an important resource in advancing multilingual learners’ language growth. Figure 1B illustrates Standard 1 and its association with the other ELD standards.

Figure 1B The Relationship of WIDA ELD Standard 1 With Other WIDA ELD Standards



Historically, WIDA ELD Standard 1 has been inclusive of everyday language and has included complex language for multilingual learners to engage in learning. A range of activities such as naming different routines and roles, following directions, working with materials, and seeking help or clarification remain integral to ELD Standard 1. In addition, in this 2020 Edition, the language for content standards' goals for questioning and engaging in instructional processes and procedures, such as inquiry or investigation, have been made more explicit.

Examples of Topics, Tasks, and Situations Involving Language for Social and Instructional Purposes

The following figure lists a representative sampling of content topics, tasks, and situations that is related to inquiry, questioning, and procedures that are reflected in Standard 1 across the K-12 spectrum. In addition, the list touches on social-emotional competencies and principles.

Figure 1C K-12 Topics, Tasks, and Situations Involving Language for Social and Instructional Purposes

Topics	Tasks/Situations
<ul style="list-style-type: none"> • personal experiences or histories • personal or academic goals • individual needs, including health and safety • diversity and multiculturalism • beliefs and values • character traits • humor or entertainment • media and virtual interaction • classroom materials and technology • choices and behaviors • decision-making • conflict resolution • interests and preferences • issues in schools or communities 	<ul style="list-style-type: none"> • setting learning community norms and expectations • following directions • asking and answering questions • building and maintaining relationships • acknowledging varying perspectives • discussing, expressing, or responding to emotions • seeking answers, clarification, or help • formulating a question for inquiry • conducting an investigation • following or communicating procedures • reflecting on strengths and strategies for learning

This introduction on connections between content and language illustrate how WIDA has used academic content standards, practices, and frameworks as source materials for language development. It will be supplemented in the final release of the 2020 edition with grade-level cluster Content Summary Tables. These tables will provide evidence for meeting the ESSA requirement for peer review, Critical Element 1.2, Coherent and Progressive ELP Standards that Correspond to the State's Academic Content Standards. Additionally, the tables will specify the correspondence between academic content standards and the concepts for crafting Language Expectations for each Key Language Use.

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Appendix H

Standards Development Process and Acknowledgements

WIDA would like to extend its appreciation to the many educators who have inspired, supported, and contributed to the development of the 2020 Edition of the English Language Development (ELD) standards. This appendix outlines the process by which WIDA conceptualized, drafted, and reviewed the 2020 Edition and acknowledges the many state, local, and school educators who provided input. This appendix also contributes documentation which state education agencies (SEAs) might use during the federal peer review process to show they have met Critical Element 1.5: *Meaningful Consultation in the Development of Challenging State Standards and Assessments* (U.S. Department of Education, 2018).

Since the WIDA ELD Standards were first published in 2004, they have highlighted the importance of developing student language abilities in five schooling contexts described in the five WIDA Standards statements. As part of the regular development cycle, the 2004 edition was first revised in 2007 and then further amplified in 2012. With each subsequent revision, the WIDA ELD standards continue to build on previous edition, incorporate emerging research, and address federal legislation and associated policy trends.

Project Launch (November 2018)

In November of 2018, WIDA launched the development of the 2020 Edition of its ELD Standards. The project purpose was to bring coherence to the WIDA ELD Standards Framework by creating a stable set of language expectations and indicators to replace the 2007 and 2012 standards editions. These source documents would serve as large-scale assessment specifications, used for policy and assessment purposes, and used by state, district, and school educators

The project team systematically reviewed data from a recently completed, yearlong needs assessment report of the WIDA ELD Standards and the SEA Standards Success Criteria that had been created after the publication of that report. [More information about the needs assessment and success criteria has been placed in the Evaluation section at the end of this Appendix.]

The project team then created and refined a series of prototypes. These items were brought to the WIDA SEA Standards Subcommittee for review.

Quarterly SEA Review and Feedback (2018-2020)

Meeting on a quarterly basis, the WIDA Standards Subcommittee members reviewed, discussed, and provided suggested next steps on different iterations of conceptual questions and standards prototypes. SEA subcommittee members also discussed issues related to standards adoption and supporting resources for standards implementation.

WIDA gratefully acknowledges the many contributions made by members of the Standards Subcommittee. The following table lists subcommittee members who have supported standards development efforts.

Table 1. SEA Standards Subcommittee Members (2018-2020)

2018-2019 Subcommittee Members	2019-2020 Subcommittee Members
<ul style="list-style-type: none"> • Sam Aguirre (IL) • Julie Chi (MN) • Jacqueline Ellis (GA) • Audrey Lesondak (WI) • Barb Marquer (WY) • Sophia Masewicz (NV) • Flavia Molea Baker (RI) • Adam Pitt (IN) • Joann Runion (TN) 	<ul style="list-style-type: none"> • Andrew Bennett (ID) • Julie Chi (MN) • Jessica Costa (VA) • Jacqueline Ellis (GA) • Cary Knight (DE) • Audrey Lesondak (WI) • Barb Marquer (WY), • Sophia Masewicz (NV) • Flavia Molea Baker (RI) • Adam Pitt (IN) • Rebekah Ottenbreit (CO)

Local Educational Agency (LEA) Advisory Committee (2018-2020)

WIDA also received quarterly feedback on standards development issues and prototypes from the WIDA LEA Advisory Committee. WIDA is most appreciative of the district perspectives provided by local educators serving on this committee.

Table 2. LEA Advisory Committee Members

2018-2019 LEA Committee Members	2019-2020 LEA Committee Members
<ul style="list-style-type: none"> • Nadra Shami (MI) • Skip Clevenger (KY) • Ellen Guettler (MT) • Deena Marshall (DC) • Barb Hasting (NV) • Vicky Saldala (FL) • Christine Lay (PA) • Claudia Franks (MO) 	<ul style="list-style-type: none"> • Barb Hasting (NV) • Vicky Saldana (FL) • Lorri Kondo (HI) • Carolyn Bookmeyer (IN) • Travy Moncure (ME) • Claudia Franks (MO) • Christine Lay (PA) • Jennifer Cox (TN)

Standards Alignment Panel (August 2019)

Prototype development work continued throughout Spring and Summer 2019. Along with regular reviews by the members of the WIDA Standards Subcommittee, in August 2019, WIDA convened a panel of national content and language alignment experts in order to ensure the 2020 edition of the WIDA ELD Standards, 2020 Edition would be positioned to meet peer review requirements.

Panelists offered recommendations on evidence needed to meet peer review critical elements, elements to serve as a foundation for a future alignment study, and elements to be included in test specifications. As next steps in this process, the group of experts provided the following set of recommendations:

1. Focus attention, in particular, on Critical Elements 1.2 (language standards-to-content standards alignment) and Critical Elements 2.1 (language standards-to-language assessment alignment),
2. More clearly identify and articulate alignment arguments and inferences used to define the standards-to-assessment relationship,
3. More clearly articulate the relationship among key standards components (Performance Definitions, Key Language Uses, and Language Expectations),
4. More intentionally use *ACCESS for ELLs* student data to inform standards design and development decisions,
5. More clearly identify level of documentation and components needed for peer review, a future alignment study, and test item development; and
6. Improve and streamline detail and range of information provided in the Language Performance Indicators.

Thanks to the following individuals for their important contributions during the Standards Alignment Panel

Table 3. Expert Alignment Panel

August 2019 Alignment Panel Members

- Sara Christopherson, University of Wisconsin – Madison (WCEPS)
- Karin Hess, Educational Research in Action
- Rebecca Kopriva, University of Wisconsin - Madison (ONPAR)
- Steve Sireci, University of Massachusetts Amherst
- Art Thacker, HumRRO
- Laura Wright, University of Wisconsin - Madison (ONPAR)
- Shu Jing Yen, Center for Applied Linguistics

WIDA Conference Teacher Focus Groups (October 2019)

After the August 2019 Expert Panel, WIDA streamlined and narrowed its prototype down to four components to create what is now known as the 2020 Edition WIDA ELD Standards Framework: Three Five WIDA ELD Standards statements, four Key Language Uses, grade-level cluster Language Expectations, and grade-level cluster Proficiency Level Descriptors [a new plain language name for the Performance Definitions].

As a check to ensure the Fall 2019 redevelopment work was positioned to meet state, district/LEA, and school-based educators needs, WIDA then convened five focus groups at the 2019 WIDA conference in Providence, Rhode Island.

Educators in the five focus groups indicated that the 2020 Edition would be a helpful resource to use when collaborating with colleagues, provided a good representation of grade level content standards. Participants requested that WIDA staff continue to add more examples, explanations, scaffolding, and multimodality, even while continuing to streamline text.

WIDA is most appreciative of the time and insights provided by the following educators:

Table 4. October 2019 Focus Group Participants, WIDA National Conference

Focus Group #1	Focus Group #2	Focus Group #3
District English Language Learner (ELL) Coordinators, ELL/bilingual teachers, Instructional Coach, State Agency Administrator <ul style="list-style-type: none"> • Lourdes Khosrozadeh, FL • Jamie Ingle, NC • Dana Greene, NC • Amy Murphree, AL • Carmen M Oquendo, CO • Mirvat Habhab, MI • LaTonya Davis, SC 	District ELL Coordinators, ELL/bilingual teachers, general education/content teachers <ul style="list-style-type: none"> • Kristina Robertson, MN • Michelle Lindbloom, MT • Dana Gottlieb, MA • M. Maija Talso, NV • Nicole Ponti, NH • Linda Belnap, NV • Elizabeth Eastman, RI • Leah Dobbs Black, AL • Aoife Maria Burke, Brazil • Ruby Yip, MD • Daniel R Yip, MD 	District ELL Coordinators, State Agency Administrators <ul style="list-style-type: none"> • Beth Vande Hey, WI • Maha Abdelkader, MD • Erica Bundy, TN • Susan Walz, NC • Susan Murphy, SC SEA • Richard M. Knox, GA • Tamara Hewlett, MD • Cindy Cox, AL
Focus Group #4	Focus Group #5	
Instructional Coaches, ELL & bilingual teachers, Consultants <ul style="list-style-type: none"> • Glenda Harrell, NC • Andrew Rodgers, MI • Becca Gregory, TN 	Higher Education Instructors <ul style="list-style-type: none"> • Tia Kimball, University of Northern Florida • Nancy Cloud, Rhode Island College • Peter Vigil, Metropolitan State, University of Denver • Christine Leider, Boston University 	

<ul style="list-style-type: none"> • Heather Gilbert, ME • Angie Thomas, SD • Geraki Marie Kossonou, GA • Greg Spoon, AL • Jessica Lodle, NC (national consultant) • Lauren Adams, MA 	<ul style="list-style-type: none"> • Kara Viesca, University of Nebraska-Lincoln • Sara Niño, Lasell University (MA) • Trish Morita-Mullaney, Purdue (IN) • Wayne E. Wright, Purdue (IN) • Nancy Commins, University of Colorado, Denver • Kristina Soprano, Roger Williams U (RI)
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Large-Scale Public Input (November – January 2019)

WIDA published its standards for large-scale input in late November 2019. WIDA would like to thank to the 1,245 respondents from 43 U.S. states and territories and nine other countries; another 15 respondents came from nine countries; 15 respondents were from non-WIDA Consortium states.

- Fifty-eight percent of respondents identified themselves as ELL, ESL, or bilingual teachers;
- Twelve percent identified themselves as school or district ELL administrators;
- Ten percent identified themselves as general education or content teachers; and
- Twenty percent were divided among instructional coaches, state agency administrators, special education teachers, consultants, other school or district administrators, paraprofessionals or teaching assistants, higher education instructors or professors, researchers, and early childhood practitioners.

While nearly two-thirds, 64%, of 1,054 respondents selected the top three ratings (8-10) to indicate they would be very likely to recommend this edition to colleagues, 9% of respondents selected the bottom four ratings (0-3) to indicate they would be unlikely to recommend this edition. The major reason for these lower rates were due to the overall complexity of the materials.

WIDA used interim and final results from this survey as a focus for the remaining months of development work. To reduce the complexity of concepts, changes were suggested to more clearly integrate concepts derived from content standards and language features into WIDA Language Expectations; efforts were also made to re-check the level of rigor in the grade-level cluster Proficiency Level Descriptors (PLDs), especially at Level 1 and *Level 2*.

Proficiency Level Descriptor Review Panel (February 2020)

After several months of further development work and to address questions raised in the Winter 2019-2020 Public Input, WIDA convened a statewide panel of 33 experienced K-12 educators from small, medium, and large divisions [districts] from across Virginia. To ensure WIDA had adequately addressed concerns raised during Public Input, the Virginia PLD Panel was

asked to review an updated January 2020 version of the Receptive Language PLDs to check the developmental accuracy. Moreover, to support consequential validity framing about local uses of the PLDs, panelists were asked to create recommendations on appropriate uses for PLDs.

Using a series of panel activities to deconstruct, compare, and then reconstruct the PLDs, panelists confirmed the development accuracy of the PLDs, as well as their horizontal and vertical alignment. Panelist created recommendations to heighten continuity with the current K-12 Performance Definitions as well as appropriate and inappropriate local uses, resources to support PLD application, and ways to address students with unique backgrounds and learning needs.

Table 5. Proficiency Level Descriptor Review Panel (February 2020)

Educators and Advisors		
<ul style="list-style-type: none"> • Sonia Arellano • Amanda Davis • Mariela Dekraker • Sarah Eqab • Kathleen Fay • Jane Flegal • Marnie Garnier • Jennifer Gray • Claudia Goyzueta • Lauren Herr 	<ul style="list-style-type: none"> • Julie Kimble • Rachel Lanier • Brianna Massingale • Sylvia McPeters • Erica Meadows • Katharine Padilla • Anh-Tu Phillips • Valerie Pinkney • Vanessa Sekinger • Mike Staroscik 	<ul style="list-style-type: none"> • Lisa Stosch • Suzanne Szigeti • Ilene Teixeira • Jessica Tipling • Darina Walsh • Mandy Walter • Suzanne Whaley • K. Nicola Williams • Jason Wright • Hector Yanez

Researcher/Teacher Educator Panel (April 2020)

With development work on the 2020 Edition nearing fruition, in April 2020, WIDA convened two virtual panels of nationally recognized Institutes of Higher Education (IHE) experts for the following purposes:

1. To obtain feedback on the quality, relevance, and usefulness of the proposed 2020 Edition to IHE teacher educators and researchers of K-12 content and language teachers and
2. To cross-check the degree to which the 2020 Edition met criteria outlined by internal WIDA stakeholders, state education agency (SEA) stakeholders, and a previous expert panel on alignment issues.

WIDA is most appreciative the time and insights shared by panel members:

Table 6. Researcher/Teacher Advisory Panel (April 2020)

April 7 th Panel	April 9 th Panel
<ul style="list-style-type: none"> • Kathryn Accurso (The University of British Columbia) • Luciana de Oliveira (University of Miami) 	<ul style="list-style-type: none"> • Zenaida Aguirre-Muñoz (University of Houston) • Zhihui Fang (University of Florida) • Okhee Lee (New York University) • Chris Leider (Boston University)

April 7 th Panel	April 9 th Panel
<ul style="list-style-type: none"> • Meg Gebhard (University of Massachusetts, Amherst) • Lorena Llosa (New York University) • Chris Rivera (East Carolina University) • Russell Swinburne Romine (University of Kansas) • Patricia Velasco (Queens College) 	<ul style="list-style-type: none"> • Trish Morita-Mullaney (Purdue University) • Kathy Swan (University of Kentucky) • Wayne Wright (Purdue University) • Jeff Zwiers (Stanford University)
Survey Respondents	
<ul style="list-style-type: none"> • Margaret Hawkins (UW-Madison) • Claudia Rinaldi (Lasell University) 	

Ongoing Evaluation of Project Success

Throughout the 2018-2020 development of the 2020 Edition, WIDA staff monitored the quality of the development work in relation to a 2017 needs assessment (Shafer Willner & Castro, 2017). WIDA would like to thank the long list of educators and WIDA staff members who participated in this precursor needs assessment. Table 1 provides an overview of the range of yearlong needs assessment activities and acknowledgement of those who participated in this work.

Table 7. *Data Collection Activities for the Standards Needs Assessment*

Date	Activity	Participants
January-November 2016	Interviews	<p>WIDA staff members from the following teams:</p> <ul style="list-style-type: none"> • Leadership: Tim Boals, Merideth Trahan, Jesse Markow • Assessment: Mark Chapman, Stephanie Gibson, Kei Bishop • Early Year: Judy Ballweg, Jillian Clemens • Communications and Marketing: Scott Gomer • Professional Learning: Jessica Costa, Troy Dassler, Margot Downs, Leslie Grimm, Amy King, Melissa Paton • Research: Gary Cook, Daniella Molle • Standards: Mariana Castro, Laurene Christensen, Delis Cuellar, Margo Gottlieb, Cindy Lundgren, Lorena Mancilla, Amanda Spalter, Ruslana Westerlund • State Relations: Andrea Camillieri, Jonathan Gibson, Kathi Koppa, Maureen Keithley • ONPAR: Rebecca Kopriya
Summer and Fall 2016	Individual interviews and October 2016 in-person panel	<p>Experts in the field of academic content standards, second language acquisition and pedagogy who helped WIDA to unpack two theoretical questions, “What is language?” and “What is language development?”</p> <ul style="list-style-type: none"> • Sylvia Celedón-Pattichis (University of New Mexico) • Okhee Lee (New York University) • Meg Gebhard (University of Massachusetts Amherst) • Audrey Lesondak (Wisconsin Department of Public Instruction)

Date	Activity	Participants
		<ul style="list-style-type: none"> • Kathy Swan (University Kentucky) • Guadalupe Valdes (Stanford University)
December 2016	Individual interviews and WebEx	<p>A second group of well-known experts helped WIDA delve more deeply on improving connections between language development and disciplinary learning and conceptualizations of language development</p> <ul style="list-style-type: none"> • Bill Cope and Mary Kalantzis (University of Illinois at Urbana-Champaign) • Alison Bailey (University of California, Los Angeles) • Mariana Pacheco (University of Wisconsin – Madison) • Kathy Escamilla (University of Colorado Boulder) • Ester de Jong (University of Florida) • Rebecca Kopriva and Laura Wright (University of Wisconsin – Madison) • Carl Grant (University of Wisconsin – Madison)
January 2017	Survey	All SEA members of the WIDA Consortium were offered the opportunity to complete a short questionnaire. Twenty-seven individuals from 12 states completed the questionnaire.
Winter 2016-17	Interviews	<p>Eight of the 10 SEA members of the WIDA Standards Subcommittee participated in interviews:</p> <ul style="list-style-type: none"> • Jaqueline Ellis (GA) • Laura Hook (MD) • Barb Marquer (WY) • Joan Runion (TN) • Julie Chi (MN) • Judy Radford (VA) • Fernanda Kray (MA) • Sophia Masewicz (NV) • Adam Pitt (IN) • Audrey Lesondak (WI) • Ken Bond (NJ)

WIDA Standards Subcommittee

After the 2017 needs assessment report was published, SEA representatives who served on the consortium Standards Subcommittee reviewed it and subsequently created a set of SEA Success Criteria to gauge development progress. WIDA gratefully acknowledges the contributions made by members of the Standards Subcommittee who participated in the needs assessment activities and supported development of the Standards Success Criteria.

Table 8. SEA Standards Subcommittee Members (2016-2020)

2016-2017 Subcommittee Members	2017-2018 Subcommittee Members
<ul style="list-style-type: none"> • Ken Bond (NJ) • Julie Chi (MN) • Jaqueline Ellis (GA) • Laura Hook (MD) • Fernanda Kray (MA) • Audrey Lesondak (WI) • Barb Marquer (WY) • Sophia Masewicz (NV) • Adam Pitt (IN) • Judy Radford (VA) • Joan Runion (TN) 	<ul style="list-style-type: none"> • Ken Bond (NJ) • Julie Chi (MN) • Jacqueline Ellis (GA) • Laura Hook (MD) • Fernanda Kray (MA) • Audrey Lesondak (WI) • Barb Marquer (WY) • Sophia Masewicz (NV) • Adam Pitt (IN) • Joann Runion (TN) • Judy Radford (VA)

WIDA is also appreciative of the district perspectives provided by local educators serving on the WIDA LEA Advisory Committee who helped review the standards needs assessment.

Table 9. LEA Committee Members

2016-2017 LEA Committee Members	2017-2018 LEA Committee Members
<ul style="list-style-type: none"> • Tracy Halpin (AL) • Maggie Churchill (NJ) • Lorri Ann Lovato (WY) • Julie Eldridge (GA) • Laura Grisso (OK) • Ivona Todorovic (ND) • Stephany Moore (NM)* 	<ul style="list-style-type: none"> • Maggie Churchill (NJ) • Skip Cleavinger (KY) • Sherri Clark (DE) • Ellen Guettler (MT) • Julie Eldridge (GA) • Deena Marshall (DC) • Laura Grisso (OK)* • Nadra Shami (MI)

2017 SEA Success Criteria for Standards

1. Definition: Do the final Standards Refresh products clearly and concretely...

- *Define* ELD Standards?
- *Distinguish* ELD standards from content standards?
- *Explain the relationship* between ELD and content standards?

2. Purpose: Do the final Standards Refresh products clearly and concretely explain the *purpose* of ELD Standards?

3. Audience(s): Do the final Standards Refresh products clearly and concretely...

- Define the primary audience(s) for the ELD standards?
- Explain vision for the content teacher and for the bilingual/ESL teacher?

4. Functionality: Do the final Standards Refresh products clearly and concretely...

- Offer explicit attention to English Language Development for English Learners, while implicitly allowing for the support of English Language Development through various means (including biliteracy development and native language supports)?
- Provide educators with requirements on what students need to be able to do (skills) and what they need to know in order to do it, and at what level of sophistication or rigor?
- Provide educators with the information they need to measure progress and make sound decisions about both policy and practice?
- Provide an explicit framework for application in the development of bilingual/ESL curriculum?
- Offer a clear separation between mandated standards and optional resources/guidance for how to operationalize standards?
- Articulate standards to appropriately satisfy requirements for peer review and state board consideration?

5. Streamlining: Do the final Standards Refresh products increase clarity, coherence, rigor, and applicability while reducing complexity? Do they...

- Clearly articulate what expectations are so that educators and administrators know what is required for both short (daily lessons) and long term (units, curricular mapping, scope and sequence, etc.) instructional planning and delivery. Educators understand what students need to achieve and how to measure it?
- Provide shorthand to document which standards teachers are using for daily lesson planning (e.g. LoS.1.A). This would be similar to the shorthand in other standards documents (e.g. CCSS.ELA-LITERACY.W.7.1)?

WIDA Staff Contributions

The 2020 Edition was made possible through the efforts of the following WIDA staff members:

WIDA ELD Standards Development Team

Table 10. WIDA Standards Development Team

Original Development Team (Beginning November 2018)	New Members to Expanded Standards Development Team (Beginning May 2019)	Project Sponsor and Management Staff
Andrea Cammilleri <i>Content Lead (through May 2020), Marketing, Communications, State Relations, Developer</i>	Fernanda Kray <i>Content Lead (beginning May 2020), State Relations, Marketing, Communications, Standards Document Content</i>	Elizabeth Cranley <i>Project Sponsor</i> Annemarie Banas <i>Project Coordinator</i>

<p>Margo Gottlieb <i>Design, Standards Document Content Developer, Conceptual Overviews</i></p> <p>Lynn Shafer Willner <i>Proficiency Level Descriptor Developer, Alignment, Correspondences, Digitalization Preparation</i></p>	<p><i>Developer</i></p> <p>Ruslana Westerlund <i>Systemic Functional Linguistics: Key Language Uses, Language Functions and Features Developer</i></p> <p>Cynthia Lundgren <i>Systemic Functional Linguistics: Key Language Uses, Language Features Developer</i></p>	<p>John Cusimano <i>Project Manager (through July 2019)</i></p> <p>Brandon Gingham <i>Project Manager (beginning July 2019)</i></p>
Consultants	Editing and Graphic Design	Marketing
<p><u>Systemic Functional Linguistics</u></p> <p>Sharon Besser Luciana de Oliveira Elizabet Sena</p> <p><u>Content Summary Review</u></p> <p>Leslie Huff</p>	<p>Rebecca Holmes <i>Editor</i></p> <p>Janet Trembley <i>Graphic Design</i></p>	<p>Katie Rozas Fahrenkrug</p> <p>Lynne Kroll <i>Educator Research and Insights</i></p>

WIDA Leadership		
<ul style="list-style-type: none"> • Tim Boals • Heather Buettner • Mariana Castro • Mark Chapman 	<ul style="list-style-type: none"> • Gary Cook • Jonathan Gibson • Dan Machmeier 	<ul style="list-style-type: none"> • Ngoc-Diep Nguyen • Merideth Trahan • Amber Wilke Fournier
WIDA Staff Contributors		
<ul style="list-style-type: none"> • Jennifer Aleckson • Hannah Rose Brandt • Kei Bishop • Jen Daniels • Heather Elliot • Leslie Grimm • Lori Hanna • Jenny Hill-Wild • Andrew Kahn 	<ul style="list-style-type: none"> • Aaron Burreson • Jessica Costa • Andrew Kahn • Amy King • Justine Kolb • Rita MacDonald • Lorena Mancilla • Rachel Maske • James Mitchell • Daniella Molle 	<ul style="list-style-type: none"> • Virginia Morales • Edith Nava • Christina Nelson • Jon Nordmeyer • Stephen O'Connell • Melissa Paton • Maureen Purcell • Courtney Skare • Elizabeth Warren • Jennifer Wilfrid

WIDA would also like to extend its appreciation to representatives from all the member SEAs who contributed thoughtful feedback and guidance throughout the project, both at the annual Board Meeting and on an ongoing basis in response to WIDA questions.

WIDA Consortium Member States, Territories and Federal Agencies		
<ul style="list-style-type: none"> • Alabama • Alaska • Bureau of Indian Education • Colorado • Delaware • Department of Defense Education Activity • District of Columbia • Florida • Georgia • Hawaii • Idaho • Illinois 	<ul style="list-style-type: none"> • Indiana • Kentucky • Maine • Maryland • Massachusetts • Michigan • Minnesota • Missouri • Montana • Nevada • New Hampshire • New Jersey • New Mexico • North Carolina • North Dakota 	<ul style="list-style-type: none"> • Northern Mariana Islands • Oklahoma • Pennsylvania • Rhode Island • South Carolina • South Dakota • Tennessee • U.S. Virgin Islands • Utah • Vermont • Virginia • Wisconsin • Wyoming

References

Shafer Willner, L. & Castro, M. (2017). WIDA Standards Refresh Needs Assessment Report. Madison, WI: WIDA.



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EXECUTIVE SUMMARY

Final Proposal: Ed 1000 – Vocational Rehabilitation Programs Emergency Rule Expires January 10, 2020

Submitted to the State Board of Education, September 10, 2020:

A. ACTION NEEDED

A vote is needed by the State Board of Education to approve the Final Proposal for Ed 1000, Vocational Rehabilitation Programs.

B. RATIONALE FOR ACTION

These rules are amended to remove duplicative information between the rules and the Code of Federal Regulations (CFR). The rules now point to the relevant CFR. Additional customer facing processes and forms have been incorporated into the final proposal as recommended by an audit by the legislature. In addition to these rules, and as required by 34 CFR 361, the Bureau of Vocational Rehabilitation relies on a policy manual in conducting its day-to-day operations. The deadline for submitting the final proposal is September 11, 2020.

C. EFFECTS OF THIS ACTION

If the board votes to approve this rule the department will submit the rule to the Office of Legislative Services (OLS) for review by the Joint Legislative Committee on Administrative Rules (JLCAR).

D. POSSIBLE MOTION

I move that the State Board of Education approve the final proposal for Ed 1000, Vocational Rehabilitation Programs.

Readopt with amendment Ed 1000, effective 1-10-20 (Document #12971, Interim), to read as follows:

CHAPTER Ed 1000 VOCATIONAL REHABILITATION PROGRAMS

PART Ed 1001 PURPOSE, ~~AND SCOPE~~, ***INTENTION, AND PARTICIPANT INVOLVEMENT***

Ed 1001.01 Purpose. Chapter Ed 1000 for the New Hampshire vocational rehabilitation services program provide the rules for uniform application of the State Vocational Rehabilitation Services Program authorized by Title I of the Rehabilitation Act of 1973, as amended, 29 U.S.C. 701 et seq. and regulated by 34 CFR Parts 361, ***363, 367, and 397***.

Ed 1001.02 Scope.

(a) The New Hampshire vocational rehabilitation services (***NHVR***) program shall be responsible for assessing, planning, developing, and providing vocational rehabilitation services for individuals with disabilities, consistent with their strengths, resources, priorities, concerns, abilities, capabilities, interests, and informed choice, so that they can prepare for and engage in gainful employment. The rules for the New Hampshire vocational rehabilitation services program implement the State Vocational Rehabilitation Services Program authorized by Title I of the Rehabilitation Act of 1973, as amended, 29 U.S.C. 701 et seq.

(b) NHVR shall work with individuals with disabilities to obtain an employment goal in the most competitive and integrated employment settings consistent with the individual's unique employment factors, as described in Ed 1006.02. In addition, NHVR provides training and services to employers. Services include training and technical assistance on disability awareness issues, providing guidance on developing work-based learning experiences, providing pre-employment transition services for students with disabilities, providing recruitment training, as well as training techniques to assist in successful employment goals.

(c) NHVR shall comply with the provisions of this chapter and 34 CFR 361 when determining the eligibility and scope of vocational rehabilitation services for individuals with disabilities.

Ed 1001.03 Intention to Achieve an Employment goal.

(a) During the application process, individuals shall be informed that vocational rehabilitation services are only provided if they intend to achieve an employment goal. Individuals with disabilities are active partners with the vocational rehabilitation counselor and together work to establish employment goals and the steps to reach those goals.

(b) An employment goal means an individual entering, advancing in, or retaining:

(1) Full time, or if appropriate part-time, competitive integrated employment;

*(2) Supported employment that meets the definition of competitive integrated employment;
or*

(3) Other types of employment in competitive integrated settings consistent with the individual's employment factors, including customized employment, self-employment or business ownership, and telecommuting.

1001.04 Participant Involvement

(a) The bureau recognizes that individuals with disabilities, their families and representatives are partners with their NHVR counselors in developing their vocational rehabilitation plans. The active involvement of individuals in their plans for employment contributes to the success of, and satisfaction with, the employment goal and degree of independence achieved.

(b) The vocational rehabilitation counselor is available to assist the individual with the vocational rehabilitation process and the attainment of the employment goal.

(c) The bureau shall foster the greatest degree of independence and responsibility, as desired by an individual. Individuals shall be encouraged to actively participate in developing their own IPE's, schedule their own appointments, complete investigatory assignments and perform other tasks with the full support and guidance of their counselors, as needed.

(d) Families, representatives and others shall also be encouraged to play an important role in the success of a vocational rehabilitation plan to the extent the individual with a disability requests, desires and needs such supports.

PART Ed 1002 DEFINITIONS

Ed 1002.01 Definitions. In addition to the definitions in the in 34 CFR 361.5, unless context makes another meaning manifest, the following definitions shall apply to Ed 10003 through Ed 1012:

(a) “Available Resources” means the amount of money that an eligible individual has available to pay toward NHVR’s financial need based services as determined by a financial need review outlined in Ed 1011;

(ab) “Bureau Commensurate”, referencing comparable services and benefits, means the department of education, division of career technology and adult learning, bureau of vocational rehabilitation the service or benefit from another source shall be similar in scope and quality to the service or benefit offered by vocational rehabilitation services;

(bc) “Department” means the New Hampshire department of education;

(d) “Individual” means the individual requesting services or the individual’s representative;

(de) "Individual with a most significant disability" means an individual with a significant disability:

*(1) Who has a significant ~~severe~~ mental or physical impairment that seriously limits 23 or more functional capacities such as mobility, **motor skills**, communication, self-care, self-direction, interpersonal skills, work tolerance and work skills, or work tolerance or work skills in terms of employment ~~outcomes~~goals; and*

(2) Whose vocational rehabilitation can be expected to require 23 or more vocational rehabilitation services, in addition to the vocational rehabilitation counselor provided services of guidance, counseling, service coordination and job placement, over an extended period of time of 6 months or longer.

(f) “New Hampshire Vocational Rehabilitation (NHVR)” means the department of education, division of workforce innovation, bureau of vocational rehabilitation, which shall serve as the designated state unit as defined in 34 CFR 361(c)(13).

(eg) "Program for the deaf and hard of hearing" means the program established under RSA 200-C:18.

~~(f) "Review" means the procedure for determining whether decisions made by personnel of the bureau that affect the provision of vocational rehabilitation services are consistent with the Act and rules adopted thereunder.~~

PART Ed 1003 PROTECTION, USE, AND RELEASE OF PERSONAL INFORMATION

Ed 1003.01 Notice to the Individual.

(a) At the time of the initial interview, and as appropriate through the rehabilitation process, the counselor shall inform an individual of NHVR's policies on acquiring, using and protecting information of a personal nature. Such notice shall be given in a language or method of communication understandable to the individual. The explanation shall include at least general information about the principal purposes for which NHVR intends to acquire, use or release the information and shall identify those agencies and circumstances under which NHVR expects to share the information. The individual shall give full and informed consent in writing to release any information. The individual shall also be informed that they can withdraw their consent for release of information by notifying NHVR in writing.

(b) If an individual indicates that information in his or her file is misleading or inaccurate, NHVR shall carefully consider the individual's reasons. Obvious errors shall be corrected, but information regarded by the counselor as accurate and necessary shall be retained. If the information is not amended, the record of services must document that the individual did request such an amendment and the individual shall be informed of the availability of the hearing process.

(c) If an individual refuses to grant permission for NHVR to release information or obtain needed information from another agency or source, the reasons for the refusal shall be discussed and the potential consequences shall be explained to the individual. If the refusal results in NHVR being unable to share or obtain needed information, NHVR shall make a decision on whether or not to proceed with the case.

Ed 1003.042 Confidentiality. In addition to the requirements under 34 CFR 361.38, the following shall apply regarding confidentiality:

(a) NHVR's acquisition of personal information about applicants includes the obligation to fully inform applicants about what information is gathered and how it will be used, and how it will be safeguarded against unnecessary or inappropriate dissemination. Personal information is all material which is identifiable to an individual, including reports, evaluations, case histories, notes, photographs and directory information. NHVR's obligation to preserve confidentiality pertains to its own use of information directly, and the release of personal information to third parties, other individuals, and agencies. Release of personal information also involves the individual's access to his or her own personal information and records.

~~(ab) All current and stored information as to personal facts given or made available to the designated state unit, its representative, or its employee, in the course of the administration of the vocational rehabilitation program, including photographs, lists of names and addresses and records of agency evaluation, shall be held to be confidential by the division and by individuals, service providers, other cooperating agencies and organizations, and interested parties to whom such information is disseminated To the greatest extent possible, NHVR shall use existing information in determining eligibility or providing services to an individual. To the extent existing information is insufficient,~~

NHVR shall obtain only information necessary to determine eligibility or to provide services to an individual. Necessary information may already exist and be available from the individual and his or her family members, treating physicians, other agencies, or it may be information acquired by NHVR specifically for the purpose of serving the individual;

(c) An individual shall have full, timely access to any information that NHVR maintains about him or her, unless NHVR determines that some information may be harmful to the individual or if NHVR obtained the information from a source which has restricted its dissemination to the individual. Information that may be harmful shall be released only to persons designated by the individual as his or her representative. If NHVR received information from a source that restricted its further dissemination, NHVR shall advise the individual to contact that source directly to obtain the information.

(bd) Individuals, agencies, and organizations shall pay a fee of \$.06 per page to cover costs of duplicating records and making extensive searches required for the release of information in accordance with 34 CFR 361.38 and the rules of this part.

Ed 1003.023 **Personal Data Collection**. In addition to the requirements of 34 CFR 361.38, the following shall apply to ***personal*** data collection:

(a) The collection of personal information ***data*** by ~~designated state unit~~ ***NHVR*** personnel concerning applicants and eligible individuals shall be authorized by the applicant or individual through completion of a release of information permit containing the “***Application for Vocational Rehabilitation Services and Authorization to Release Information***” form, revised August 2020:

~~(1) Date;~~

~~(2) Applicant or individual’s name;~~

~~(3) Signature;~~

~~(4) Social security number optional: may be required for eligibility for certain state and federal programs; and~~

~~(5) A statement authorizing release to the designated state unit of medical, psychological, psychiatric, educational, and vocational information necessary for the determination of eligibility and development and implementation of an individualized plan for employment;~~

(b) The individual, or the individual’s representative, shall complete and file the “Personal Information Form” revised August 2020.

~~(bc)~~ The signature of the parent or guardian shall be required when the applicant or eligible individual is under 18 years old or has a legal guardian; and

~~(ed)~~ The designated state unit ***NHVR*** shall collect personal information under 29 U.S.C. 709(c), 29 U.S.C. 721(a)(6)(A), and 34 CFR 361.38. Failure by the applicant or eligible individual to provide sufficient personal information to the designated state unit ***NHVR*** to determine eligibility, or to prepare an individualized plan for employment or to monitor progress of services provided, shall result in the case being closed.

Ed 1003.034 **Release of Information**. In addition to the requirements of 34 CFR 361.38, the following shall apply to the release of information:

(a) By completing the “Application for Vocational Rehabilitation Services and Authorization to Release Information” form, revised August 2020, an applicant or individual authorizes NHVR to release relevant information when requested in accordance with this section.

~~(a) Personal information concerning the applicant or eligible individual shall not be released to any individual or organization except as authorized by the applicant, individual, or law. When personal information has been obtained from another agency or organization, it shall be released only by, or under the conditions established by, the other agency or organization. However, when such information has been used to make a determination regarding the applicant or eligible individual that is being contested through the hearing process it shall be available for release as evidence in the hearing unless precluded by law.~~ ***NHVR shall use information only for the person's participation in the vocational rehabilitation program, and shall safeguard and preserve the confidentiality of all personal information it possesses, including the way information is used within NHVR. Only persons with a need to know personally identifiable information shall be allowed access to the materials. Information shall be shared with other programs and agencies only with the individual's informed, written consent if the information is necessary for the program. If NHVR has received information from another source with restrictions or conditions for any further dissemination, NHVR will release the information only under the conditions established by the other agency or organization;***

(b) Information shall also be released for approved audit, evaluation and research for purposes directly connected with vocational rehabilitation or for purposes which would significantly improve the quality of life for people with disabilities. The entity receiving the information shall assure that it will be kept confidential and shall be used only for the purpose indicated. The final product shall not reveal any personally identifying information without the affected individual's informed written consent.

~~(bc)~~ When a third party requests particular information about an applicant or eligible individual, the third party shall provide a written request signed by the applicant or individual or their guardian designating the third party as a representative who may have access to client information. Third parties may include attorneys, service providers, and other public or private agency or organizations; and

~~(cd)~~ The request shall include:

- (1) The applicant's or eligible individual's name;
- (2) The information being requested;
- (3) The reasons why the material is being requested; and
- (4) The name of the individual, agency, or organization assuming responsibility for the information and giving assurance that the information will not be released to any other individual, agency or organization.
- (5) The request shall also include the following statement:

~~"I _____, hereby authorize the release of information for the purpose of providing vocational rehabilitation services relating to me which is in the custody or control of the New Hampshire Department of Education, Division of Career Technology and Adult Learning. I have considered and understand the implications of this waiver. The release of this information is more important to me than the loss of privacy which may result directly or indirectly from the release. I agree to hold harmless the New Hampshire Department of Education, Division of Career Technology and Adult Learning and their authorized~~

~~representatives for any damages arising out the release of the information I am requesting~~
signature of the applicant.”

Ed 1003.045 Exchanging Information with Other Parties.

(a) When ~~the bureau~~ **NHVR** is working with an agency or organization on behalf of an applicant or eligible individual, information shall be exchanged after obtaining a written release of information authorization described in Ed 1003.03(d), signed by the individual, or his or her parent or guardian if the individual is under 18 years old or has a legal guardian. For agencies and organizations having an agreement with the ~~designated state unit~~ **NHVR** to exchange information, information regarding mutual applicants or eligible individual’s information shall be exchanged without obtaining an individual’s release. The agencies and organizations having such cooperative agreements shall be identified by the ~~designated state unit~~ **NHVR** on the application for vocational rehabilitation services.

(b) Agencies and organizations with which ~~the bureau~~ **NHVR unit** shall exchange information include but are not limited to:

- (1) The New Hampshire department of health and human services;
- (2) The New Hampshire department of labor, division of workers’ compensation;
- (3) New Hampshire WORKS Partners established under the Workforce Investment Act of 1998, 29 U.S.C. 705, as described in the cooperative agreement;
- (4) Community rehabilitation programs;
- (5) New Hampshire disability determination services; and
- (6) The Social Security Administration.

(c) In situations not covered by the provisions of Ed 1003.04(a), upon receiving the informed written consent of the applicant or eligible individual or, if appropriate, the applicant’s or individual’s representative, ~~the bureau~~ **NHVR** shall release personal information to another agency or organization for its program purposes only to the extent that the information shall be released to the involved applicant or individual or the applicant’s or individual’s representative and only to the extent that the other agency or organization demonstrates that the information requested is necessary for its program.

1003.06 Exceptions.

(a) NHVR is required by law to release personal information without the individual's consent in circumstances including, but not limited to:

- (1) Subpoenas and court orders signed by a judge;***
- (2) In connection with investigations concerning law enforcement, fraud or abuse; and***
- (3) To protect the individual or others if the individual poses a threat to his or her own safety, or another person's safety.***

PART Ed 1008.4 ~~PROVISION AND SCOPE OF SERVICES~~ **REFERRALS AND APPLYING FOR SERVICES**

~~Ed 10084.01 Processing Referrals and Applying for Services.~~ In addition to compliance with the provisions of 34 CFR 361.41, the bureau shall request the following minimum information from each individual who is referred to the designated state unit for vocational rehabilitation services:

- ~~(a) Name and address;~~
- ~~(b) Disability;~~
- ~~(c) Age and gender;~~
- ~~(d) Date of referral; and~~
- ~~(e) Source of referral.~~

(a) Any individual who has a disability which results in a substantial impediment to employment may be eligible to receive services from NHVR.

(b) Individuals with disabilities may:

(1) Seek bureau services directly; or

(2) Be referred by family members, guardians, friends, schools, independent living centers, Federal, State or local agencies, medical providers, and other sources.

(c) Referral information shall include the person's name, address, date of birth, and as much of the following information as is available:

(1) Social Security number, if available;

(2) Race or ethnicity;

(3) Referral disability; and

(4) Referral source.

(d) When referring an individual to NHVR for services, the referral source may, at the time of the referral, provide all necessary and available information related to the individual's disability and employment needs to expedite eligibility decisions and planning for services.

(e) When information received from referral sources does not include name, address, date of birth or a statement of informed consent, NHVR staff shall request that the referral source provide the data as well as other necessary information.

(f) Information about the application process shall be presented to an individual as soon as possible after the referral in a group orientation or individual counseling setting. An initial contact shall not be delayed because of missing information.

(g) When referral information has been received from a referral source other than the individual without a signed application or a signed letter requesting services, NHVR shall request the individual complete and file the "Application for Vocational Rehabilitation Services and Authorization to Release Information" form, revised August 2020.

(h) Cooperative agreements and memoranda of understanding shall be established between NHVR and agencies enumerated in Ed 1003.05(b), which shall include specific referral criteria and processes to promote referral. These referral criteria should be used as appropriate.

(i) An individual is considered to have submitted an application, which means that eligibility shall be determined within 60 calendar days, when the individual or the individual's representative, as appropriate:

(1) Has either:

a. Completed and signed NHVR's "Application for Vocational Rehabilitation Services and Authorization to Release Information" form, revised August 2020;

b. Submitted a signed letter with the necessary information enumerated in Ed 1004.01(e); or

c. Has requested services verbally, because he or she cannot sign a form or letter due to a disability;

(2) Has provided information necessary to initiate an assessment to determine eligibility; and

(3) Is available to directly participate in and complete the assessment process.

(j) When applying for services, the individual shall provide information including, but not limited to, employment history, medical information, work status, or school records necessary to determine eligibility and shall be available to meet with, provide available information to, and to participate in assessments as necessary.

~~Ed 108.02 Processing Applications. The bureau shall process applications in accordance with 34 CFR 361.41(b).~~

PART Ed 1005 ASSESSMENT

Ed 1005.01 Assessment: Generally.

(a) For vocational rehabilitation, assessments shall be ongoing, person-centered and shall occur at critical decision points throughout the vocational rehabilitation process.

(b) The assessment process shall begin when an individual with a disability applies for NHVR services with the intent to reach an employment goal.

(c) The assessment process shall be utilized for the following:

(1) To determine eligibility;

(2) To determine the significance of disability;

(3) To identify the scope of required services and supports to meet rehabilitation needs;

(4) To substantiate appropriateness for supported employment;

- (5) To develop the individualized plan for employment (IPE);*
- (6) To determine progress during the implementation of the IPE; and*
- (7) To determine if the individual has achieved an employment goal in a competitive integrated setting consistent with the individual's employment factors.*
- (d) The NHVR counselor shall, to the extent possible, use existing information to establish eligibility and develop the IPE. When additional information is needed the NHVR counselor shall provide additional assessment services or other assessment services shall be authorized. These services shall be conducted in the most integrated setting possible.*
- (e) An individual shall be accommodated to participate in the assessment process using the most appropriate mode of communication to enable the individual to comprehend and respond to information being communicated during the assessment process.*

Ed 1005.02 Role of the Vocational Rehabilitation Counselor.

- (a) The NHVR counselor shall:*
 - (1) Collect, analyze, synthesize, and interpret available information;*
 - (2) Engage the individual with a disability in the assessment process; and*
 - (3) Develop a positive counseling and guidance relationship by making every effort to understand the individual's priorities during the assessment process.*
- (b) If additional information is needed, the NHVR counselor, along with the individual receiving services, shall decide how to obtain the information and establish appropriate timeframes for completion.*
- (c) The decision to pursue any additional assessments shall be fully discussed and explained to the individual.*
- (d) The NHVR counselor shall obtain only the information that is necessary for eligibility or service planning.*
- (e) The individual's active involvement shall be documented in the record of services.*

Ed 1005.03 Individual's Participation in the Assessment Process.

- (a) The individual shall be offered every opportunity to actively participate in the assessment and decision-making process.*
- (b) The individual shall:*
 - (1) Work with the NHVR counselor to understand how the assessment process is used to determine eligibility, plan for services, and identify an employment goal;*
 - (2) Be available for assessment services and complete any agreed upon assessment activities within the timeframe established; and*

(3) Participate in a discussion of the results and what they mean in terms of achieving an employment goal.

(c) The individual shall have an opportunity to respond to assessment results and include a representative in any discussions.

(d) While the decision-making process shall be collaborative, decisions shall reflect the judgment of the NHVR counselor in accordance state and federal rehabilitation policies and regulations.

Ed 1005.04 Focus on Functional Capacities and Employment Factors.

(a) Assessment shall focus on the overall functional capacities of the individual, particularly the strengths related to pursuing employment.

(b) Assessment shall include a review of the individual's disability and its impact on one or more functional capacities as described in Ed 1007.02(b)(2) .

(c) The results of the assessment process shall then identify how one or more of these functional capacities impact the individual's unique employment factors as described in Ed 1006.02(d).

(d) Assessment shall define what supports shall be provided to the individual to enhance strengths and overcome limitations. For some individuals, there may be a need to experiment with the potential supports, modifications and/or strategies that enable the individual to meet the essential performance demands of the work situation.

Ed 1005.05 Assessment for Determining Eligibility.

(a) An assessment for determining eligibility and priority for services begins when an individual with a disability applies for NHVR services, as outlined in Ed 1004.01, with the intent to reach an employment goal.

(b) An assessment and determination shall be completed within 60 days of receipt of any form of application described in Ed 1004.01.

(c) Existing information shall be reviewed by the NHVR counselor to determine if the information is sufficient to determine eligibility. This includes establishing the disability(ies), identifying the impediment to employment, and determining whether there is a need for vocational rehabilitation services.

(d) With the "Authorization to Disclose Information to NH Vocational Rehabilitation" form, revised August 2020, and all other applicable releases in place, written documentation of the person's disability shall be obtained. This documentation may be from treatment facilities, providers, medical and other diagnosticians, educational sources, federal or state agencies, therapists, and professionals who evaluate and report on functional limitations. Referrals made by other agencies may include information about the individual's disability, resulting functional limitations, and how it relates to the individual's employment needs.

(e) Individuals may obtain and provide documentation from their treating physician, certified treatment program, a licensed or certified practitioner skilled in the diagnosis and treatment of the disability, or other source that verifies the existence and extent of an impairment to assist with the eligibility determination process.

(f) If additional information is needed, the applicant and counselor shall decide how best to obtain the information and establish appropriate time frames. If the applicant is unable to provide appropriate evidence, NHVR shall obtain the required information as part of the assessment process.

(g) If not already completed, the applicant and counselor shall complete the “Personal Information Form” dated August 2020 during the assessment process using the information gathered before and during the process.

(h) Existing information will be considered adequate if, in the counselor's judgment, it provides sufficient information to document the person's disability(ies) and employment factors, resulting impediments to employment, ability to benefit from services and requirements for services.

(i) If an individual meets NHVR's eligibility criteria, eligibility must not be delayed while waiting for information that is to be used for vocational planning purposes.

(j) A determination of eligibility is not a guarantee of the provision of specific services.

Ed 1005.06 Assessment for Developing the Individualized Plan for Employment (IPE).

(a) NHVR shall conduct an assessment for determining vocational rehabilitation needs, if appropriate, for each eligible individual. The assessment shall be used to determine the employment goal and the nature and scope of vocational rehabilitation services to be included in the IPE.

(b) A comprehensive assessment of the eligible individual shall be limited to information necessary to identify the rehabilitation needs of the eligible individual and to develop the individual's IPE as follows:

- 1. Existing information shall be used as the primary source of information;*
- 2. Information provided by the individual and other sources shall be subject to the rules of confidentiality and release of information under Ed 1003 and 34 CFR 361.38;*
- 3. To the degree necessary, an assessment of the personality, interests, interpersonal skills, intelligence and related functional capacities, educational achievements, work experience, vocational aptitudes, personal and social adjustments, and employment opportunities of the individual, and the medical, psychiatric, psychological, and other pertinent vocational, educational, cultural, social, recreational, and environmental factors that affect the employment and rehabilitation needs of the individual;*
- 4. To the degree necessary, an appraisal of the patterns of work behavior of the individual and services needed for the individual to acquire occupational skills, and to develop work attitudes, work habits, work tolerance, and social and behavior patterns necessary for successful job performance, including the use of work in real job situations to assess and develop the capacities of the individual to perform adequately in a work environment; and*
- 5. Referral, where appropriate, for rehabilitation (assistive) technology services to assess and develop the capacities of the individual to perform in a work environment.*

Ed 1005.07 Referral for Assessment Services.

(a) After a review of existing information, if additional information is needed, a referral for assessment services shall be considered.

(b) When referring for assessment services, the NHVR counselor shall provide necessary information, through the most appropriate communication mode for the individual, which focuses on the individual's unique vocational needs. The referral shall include relevant background information about the individual's disability, previous education and work experience, available pertinent records, and existing reports, as appropriate.

(c) The NHVR counselor shall by prepare the individual for the assessment in advance.

(d) The VR counselor shall assist the individual in understanding the findings and develop a plan.

PART Ed 1006 ELIGIBILITY FOR SERVICES

Ed 10086.031 ~~Assessment for Determining Eligibility and Priority for Services~~. The bureau shall comply with 34 CFR 361.42 in conducting assessments for determining eligibility and priority for services to include:

~~(a) Eligibility requirements;~~

~~(b) Interim determination of eligibility;~~

~~(c) Prohibited factors;~~

~~(d) Review and assessment of date for eligibility determination;~~

~~(e) Trial work experiences for individuals with significant disabilities; and~~

~~(f) Data for determination of priority for services under an order of selection.~~

(a) A person shall be determined eligible for vocational rehabilitation services if the individual:

(1) Has a physical or mental impairment;

(2) Has a physical or mental impairment which constitutes or results in a substantial impediment to employment for the applicant; and

(3) Requires vocational rehabilitation services to prepare for, secure, retain, advance in, or regain employment that is consistent with the individual's unique strengths, resources, priorities, concerns, abilities, capabilities, interest, and informed choice.

(b) For purposes of an assessment for determining eligibility and vocational rehabilitation needs under (a) above, an individual is presumed to have a goal of an employment goal.

(c) A determination of eligibility shall not constitute a guarantee of the provision of specific services or of NHVR's financial support.

(d) Eligibility shall be determined without regard to age, race, color, religion, creed, disability, marital status, veteran status, national origin, expected employment goal, source of referral, the service needed, anticipated costs, income level, employment history, employment status, or the educational or credential status of the applicant.

(e) NHVR shall not impose a residency requirement. Persons who are not United States citizens shall prove that they are legally allowed to work in the United States as determined by the United States Citizenship and Immigration Services (USCIS).

(f) The individual or the individual's designated representative shall be involved in and informed about the eligibility determination process and decision.

Ed 1006.02 Employment Factors.

(a) The NHVR counselor shall begin the eligibility process with the presumption that all persons can benefit from vocational rehabilitation services in terms of an employment goal.

(b) Eligibility for services shall be determined in relationship to the individual's need for services to achieve an employment goal consistent with the individual's employment factors as described in (d) below.

(c) Employment factors shall be assessed, documented and considered together when determining eligibility and planning services, relying on existing information available from the individual and other sources, as well as situational assessments where appropriate. One employment factor alone does not outweigh the other factors; each factor shall be balanced with the other components when assessing eligibility or planning for services.

(d) Employment factors shall be assessed and documented in the following categories:

(1) Strengths as demonstrated by the individual's positive attributes or inherent expertise related to an employment field such as intellectual aptitude, motivation, talents, work and volunteer experience, work skills, work-related hobbies and transferable life skills;

(2) Resources as demonstrated by the individual's sources of available support, including financial, social, information, and technological, on which the person can rely to prepare for and meet employment objectives. These resources could be available from the individual, the family, or other community or public sources;

(3) Priorities as demonstrated by the individual's consistency with and relationship to employment-related preferences, based on informed choice among available options;

(4) Concerns as demonstrated by the individual's employment-related issues that need to be considered in vocational planning such as financial, self-sufficiency, medical, residential, transportation and family considerations;

(5) Abilities as demonstrated by the individual's existing physical, mental, or functional capacity to successfully engage in employment through natural aptitude or acquired proficiency;

(6) Capabilities as demonstrated by the potential for an individual to develop the skills necessary for employment through the provision of vocational rehabilitation services;

(7) Interests as demonstrated by occupational areas on which an individual has focused special attention; and

(8) Informed Choice as demonstrated by the active involvement of participants contributing to the success of and satisfaction with their employment goals in the selection of a long-

term employment goal, rehabilitation objectives, and vocational rehabilitation services including assessment services and service providers.

Ed 1006.03 Individuals who are Recipients of Supplemental Security Income (SSI) or Social Security Disability Insurance Benefits (SSDI).

(a) An individual who has a disability and is receiving SSI or SSDI benefits, as determined by the social security administration (SSA), is presumed to be eligible for vocational rehabilitation services. SSI and SSDI recipients will be considered eligible with at least a significant disability unless NHVR can demonstrate by clear and convincing evidence that the person cannot benefit from an employment goal because of the severity of the individual's disability.

(b) The individual shall provide appropriate evidence to verify the receipt of SSI or SSDI benefits. If the applicant is unable to provide appropriate evidence to support the receipt of benefits, NHVR shall obtain appropriate releases from the individual and verify the applicant's eligibility by contacting the SSA. This verification shall be made within a reasonable period of time so that eligibility for vocational rehabilitation services shall be made within 60 days of the application for services.

Ed 1006.04 Trial Work Experiences.

(a) Before an individual can be determined unable to benefit from vocational rehabilitation services because of the severity of the individual's disability, the NHVR counselor shall explore the individual's abilities, capabilities, and capacity to perform in work situations through trial work experiences.

(b) A trial work experience shall assess individuals with most significant disabilities by providing an opportunity to demonstrate their potential capacities through real work experiences.

(c) The trial work experiences shall provide an opportunity for a variety of experiences over a sufficient period of time with on-the-job supports and training, including assistive technology, except when it is determined not appropriate for an individual to participate in such experience.

(d) If a trial work experience is not appropriate for an individual, the vocational rehabilitation counselor shall document in the case record the circumstances for that determination.

(e) The results of the trial work experience shall be used demonstrate that the individual can benefit from services or shall enable the NHVR counselor to determine with clear and convincing evidence that the applicant cannot benefit from vocational rehabilitation services in terms of an employment goal.

(f) NHVR counselors shall enlist community rehabilitation providers through vocational assessments that include a situational assessment, community-based workplace assessments, work try-outs, and supported employment as a means to provide the required trial work experiences.

(g) NHVR counselors shall have a high degree of certainty before concluding that a person is incapable of benefiting from vocational rehabilitation services. There shall be clear and convincing evidence, which shall constitute the highest standard used in the civil system of law, that no employment goal is possible considering information from the trial work experience and more than one opinion considered and utilized as evidence.

(h) A written plan for the trial work experience shall be outlined in the record of services that describes the services necessary to determine eligibility. Only services to determine eligibility or to

determine the existence of clear and convincing evidence that the individual is incapable of benefiting from an employment goal because of the severity of the disability shall be provided during a trial work experience. The written plan shall include the expected duration of services, identification of the service provider, and how the experience will contribute to the determination of the individual's eligibility.

(i) All services during trial work experiences shall be provided under the same parameters as when the services are provided under an individualized plan for employment (IPE) with the goal of employment.

Ed 1006.05 Criteria for Determining Eligibility.

(a) The eligibility determination shall only be made by a NHVR counselor, and shall be based on the following criteria:

(1) A physical impairment which shall mean any physiological disorder or condition, cosmetic disfigurement, or anatomical loss affecting one or more of the following body systems:

- a. Neurological;*
- b. Musculoskeletal;*
- c. Special sense organs;*
- d. Respiratory;*
- e. Cardiovascular;*
- f. Reproductive;*
- g. Digestive;*
- h. Genitourinary;*
- i. Hemic and lymphatic;*
- j. Skin; and*
- k. Endocrine;*

(2) A mental or psychological disorder including, but not limited to:

- a. Intellectual disability;*
- b. Organic brain syndrome;*
- c. Emotional or mental illness; and*
- d. Specific learning disabilities;*

(3) The impairment, as outlined in 1006.05(a)(1)-(2), is determined to be a substantial impediment to the individual's employment when NHVR counselor, considering the individual's medical, psychological, vocational, educational, functional capacities and other related factors, finds that the impairment:

a. Hinders the individual from preparing for, entering into, advancing in, or retaining employment consistent with the individual's abilities and capabilities; and

b. Is a reason that the individual is unable to achieve an employment goal consistent the employment factors described in Ed 1006.02(d);

(4) The individual can benefit from services in terms of an employment goal as defined in 34 CFR 361.5(c)(15);

(5) Trial work experiences as described in Ed 1006.04; and

(6) The requirement of vocational rehabilitation services as described in (c) below;

(b) A determination that the impairment is a substantial impediment to the individual's employment as described in Ed 1006.05(a)(3) shall only be made by a NHVR counselor. Eligibility for vocational rehabilitation services should be considered when, due to the impairment, the individual's current employment is not consistent with the employment factors.

(c) A person requires vocational rehabilitation services when the individual, because of the substantial impediment to employment caused by their disability, cannot achieve an employment goal consistent with an individual's employment factors without receiving vocational rehabilitation services. The services provided shall be essential and necessary to overcome the barriers to employment which are the direct result of the person's disability. Persons who are currently employed shall be determined eligible for services if they meet the basic eligibility criteria. The counselor shall consider the following circumstances when determining if the individual requires NHVR services to reach an employment goal:

(1) The individual has transferable skills, which are consistent with the individual's employment factors, but the individual's disability prevents him or her from using those transferable skills to prepare for, secure, retain, advance in or regain employment;

(2) The individual cannot access services that will allow him or her to achieve an employment goal without vocational rehabilitation services;

(3) The individual lost a job because of his or her disability and this prevents him or her from finding other employment; and

(4) The individual needs to pursue another job or career because the current position is contraindicated to the disability.

Ed 1006.06 Timelines of Eligibility Determinations.

(a) Pursuant to 34 CFR 361.41(b), an eligibility determination shall be made within 60 days of applying for services, as described in Ed 1004.01(i) unless there are exceptional or unforeseen circumstances, or a trial work experience is necessary.

(b) When eligibility cannot be determined within 60 days, as stated in (a) above, NHVR staff shall reach an agreement with the applicant to extend the 60-day time limit. The applicant shall be informed of:

(1) The reasons for the delay and the steps necessary to reach an eligibility determination; and

(2) A date for which eligibility shall be determined.

(c) If the determination will be delayed beyond the projected date, staff shall work with the applicant to resolve any impediments. A new projected date for eligibility determination will be based on the anticipated time frame to collect the necessary information. If an agreement cannot be achieved, the eligibility decision shall be made as quickly as possible, and the individual shall be fully informed of his or her right to an administrative review, mediation and impartial hearing and assistance as described in Ed 1018.

Ed 1006.07 Eligibility Determination.

(a) Except as provided in Ed 1006.06(b) and (c), within 60 days of an individual's application for services as outlined in Ed 1004.01(i) NHVR shall notify the individual regarding eligibility as follows:

(1) Sufficient information and documentation exists to determine eligibility, the applicant is eligible for services, and planning for services continues;

(2) Eligibility cannot be determined because of the severity of the person's disability and a written plan is developed for the services to be provided during a trial work experience to determine if the individual can benefit from NHVR services;

(3) Sufficient information and documentation exists to determine that the applicant:

a. Does not have a disability;

b. Does not have a substantial impediment to employment;

c. Is unable to benefit from vocational rehabilitation services in terms of an employment goal because of the severity of the disability, justified by clear and convincing evidence demonstrated by a trial work experience; or

d. Does not require services.

~~Ed 10086.058 Procedures~~ **Provisions of an for Ineligibility Determination.** ~~The bureau's procedures for ineligibility determination shall comply with the provisions of 34 CFR 361.43.~~

(a) NHVR shall take the following actions concerning an ineligibility decision:

(1) The ineligibility determination shall be made only after providing an opportunity for full consultation with the individual, or as appropriate, with the individual's representative; and

(2) The applicant shall be informed in writing or by appropriate modes of communication regarding the:

- a. Determination of eligibility and the reasons for it;*
- b. Individual's right to request a review of the determination and the steps of the administrative review, mediation and impartial hearing process;*
- c. Availability of assistance through the Client Assistance Program (CAP); and*
- d. Availability of assistance to refer to other training or employment related programs through the one-stop service delivery system under the Workforce Innovation and Opportunity Act.*

(b) If an individual cannot benefit from services, the NHVR ineligibility certification and record of services shall contain clear and convincing evidence to support the determination.

(c) The applicant shall be given information about independent living centers or other appropriate services and an explanation of how to reapply for NHVR services should circumstances change.

(d) If requested by the individual, NHVR shall review within 12 months and annually thereafter, any ineligibility determination that is based on a finding that the individual is incapable of achieving an employment goal. This review need not be conducted in situations in which the individual has refused it, the individual is no longer present in the state, the individual's whereabouts are unknown, or the individual's medical condition is rapidly progressive or terminal.

Ed 10086.069 Closure without Eligibility Determination.

(a) ~~The bureau~~NHVR shall comply with 34 CFR 361.44 for closure without an eligibility determination so long as the bureau has made a minimum number of 2 attempts to contact the applicant or, if appropriate, the applicant's representative to encourage the applicant's participation ~~may not close an applicant's record of services prior to making an eligibility determination unless the applicant declines to participate in, or is unavailable to complete, an assessment for determining eligibility and priority for services, and the State unit has made a reasonable number of attempts to contact the applicant or, if appropriate, the applicant's representative to encourage the applicant's participation.~~

PART Ed 1007 SIGNIFICANCE OF DISABILITY

Ed 1007.01 Significance of Disability Categories.

(a) NHVR shall assign and track levels of significance of disabilities to ensure vocational rehabilitation services for individuals with significant disabilities, and, in the event that NHVR is unable to provide vocational rehabilitation services to all eligible individuals, establish priority categories to enable NHVR to transition services should an order of selection become necessary.

(b) The NHVR counselor shall identify an individual as having a most significant, significant, or less significant disability using existing information without delaying the eligibility decision based on criteria including, but not limited to:

- (1) The individual's functional capacities;*
- (2) The services needed to reduce the impact of disability-related limitations; and*

- (3) The duration of the rehabilitation services required for the individual to achieve an employment goal.*
- (c) Significance of disability shall not be based on a specific diagnosis or disability and the determination may be changed at any time during the life of the case.*

(d) Significance of disability shall be categorized as follows:

- (1) Individuals with a most significant disability as defined in Ed 1002.01(e);*
- (2) Individuals with a significant disability as defined in 34 CFR 361.5(30); and*
- (3) Individuals who don't have a significant disability.*

Ed 1007.02 Determining Significance of Disability.

(a) Significance of disability shall be determined by reviewing the following three criterion:

- (1) Serious limitations to functional capacity;*
- (2) More than one rehabilitation service required to reduce the impact of limitations on employment; and*
- (3) Duration of services for six months or more.*

(b) The following shall apply to serious limitations to functional capacity:

(1) Serious limitation in a functional area means a reduction, due to a severe physical or mental impairment, to the degree that the individual requires services or accommodations not typically made for other individuals in order to prepare for, enter into, engage in, advance in or retain competitive integrated employment; and

(2) Functional capacities to be considered shall include, but not be limited to:

a. Mobility which shall refer to a person's ability to move to and from work or within a work environment including walking, climbing, coordination, accessing and using transportation, and use of spatial and perceptual relationships;

b. Communication which shall refer to a person's ability to transmit and receive information through spoken, written, or other non-verbal means;

c. Self-care which shall refer to a person's ability to perform activities of daily living, to participate in training or work-related activities, including eating, toileting, grooming, dressing, cooking, shopping, washing, housekeeping, financial management, and health and safety needs;

d. Self-direction which shall refer to a person's ability to independently plan, learn, reason, problem solve, memorize, initiate, organize, and make decisions in order to allow individuals to assimilate information and learn specific skills related to job functions;

e. Interpersonal skills which shall refer to a person's ability to establish and maintain personal, family, or community relationships as they affect job performance;

f. Work tolerance which shall refer to a person's capacity to meet the demands of the workplace regardless of the work skills already possessed by the individual where limitations may be due to physical disability, stamina and fatigue, effects of medication, or psychological factors;

g. Motor skills which shall refer to a person's purposeful movement and control of the body and its members to achieve specific results to the degree necessary to get and keep a job;

h. Work skills which shall refer to a person's ability to perform specific tasks required to carry out job functions, the capacity to benefit from training in the necessary skills, and the capacity to practice the work habits needed to stay employed.

(c) The following shall apply to multiple rehabilitation services required to reduce the impact of limitations on employment:

(1) Only those services that are necessary, as a direct result of the disability, shall be included in the determination of the significance of disability, including without limitation:

a. Agency provided services;

b. Assistive technology or rehabilitation technology;

c. Job or training accommodations other than assistive technology;

d. Job-related services or community rehabilitation program (CRP) services;

e. Physical restoration services, mental restoration services, or both;

f. Reader, rehabilitation technology, and orientation and mobility for individuals who are blind;

g. Supported employment; and

h. Vocational or college training; and

(2) Assessment services, counseling and guidance, and job placement services are required by all individuals to meet a specific employment goal, and can be provided by others as comparable benefits and services, but shall not be considered when determining significance of disability.

(d) A determination that services will be required for an extended period of time shall be made when required services are expected to last six or more months after eligibility has been determined.

(e) An individual who has a disability and is receiving supplemental security income (SSI) or social security disability insurance (SSDI) benefits, as determined by the social security administration (SSA), shall be presumed to have at least a significant disability. Further review by the NHVR counselor of the individual's functional capacities may result in a determination that the individual has a most significant disability and changes may be made any time information becomes available.

PART Ed 1008 INDIVIDUALIZED PLAN FOR EMPLOYMENT

Ed 1008.01 Individualized Plan for Employment (IPE); Generally.

(a) The IPE shall contain a written plan that identifies:

- (1) The employment goal, also referred to as the employment goal;***
- (2) The services that will be provided to achieve the employment goal and the time frames for those services; and***
- (3) The steps that will measure progress toward the employment goal.***

(b) The IPE shall outline how the individual shall achieve a specific employment goal that is consistent with the individual's unique strengths, resources, priorities, concerns, abilities, capabilities, career interests and informed choice.

(c) The IPE shall contain the employment goal and specific NHVR services determined by the assessment of the individual's vocational rehabilitation needs.

(d) The individual shall be informed of his or her rights and responsibilities and the steps necessary to achieve an employment goal during the process of developing the IPE.

(e) The NHVR counselor and the eligible individual shall agree on the criteria to evaluate progress toward the employment goal.

(f) Individuals with disabilities shall be active and responsible participants in their own rehabilitation programs, including making informed, practical, and realistic choices about the selection of their employment goal, the vocational rehabilitation services they receive, and the providers of those services.

Ed 1008.02 Timelines for IPE Development.

(a) The IPE shall be developed as soon as possible, within 90 days of the determination of eligibility.

(b) If the NHVR counselor anticipates the IPE development will be delayed, the eligible individual shall be informed of, and the NHVR counselor shall document in the record of services, the:

- (1) Reasons for the delay;***
- (2) Steps necessary to complete the development of the IPE;***
- (3) Date for which the IPE shall be completed; and***
- (4) Completion of the "IPE Extension Form", August 2020.***

Ed 1008.03 Basic Requirements of the IPE.

(a) The eligible individual and the counselor shall develop the IPE based on results of the planning that began during the assessment for determining eligibility.

(b) The IPE Shall be consistent with applicable policies and procedures, sound judgment and planning considerations, and the responsible use of public funds.

(c) An approved IPE shall confirm the agreement between the individual and the counselor regarding the employment goal and the VR services necessary to achieve that goal as follows:

(1) The IPE shall be agreed to and signed by the eligible individual and reviewed, approved, and signed by the counselor or supervisor before implementation of the IPE;

(2) Any amendments to the individual's employment goal, services provided, provider of services, or increase in the cost of services shall be considered a substantive or major change to an individual's IPE and shall be agreed to and signed as outlined in (1) above;

(3) To the maximum extent possible, a written copy of the IPE, including any amendments, shall be provided to the individual in the native language or mode of communication of the individual; and

(4) The IPE shall be reviewed as often as necessary, but shall be reviewed at least annually by the individual and the counselor.

Ed 1008.084 Contents of the Individualized Plan for Employment.

(a) The bureau NHVR shall comply with the provisions of 34 CFR 361.46 in developing the content of the individualized plan for employment IPE. Notwithstanding the content of the individualized plan for employment IPE set out in 34 CFR 361.46, the bureau shall not fund or assist in the funding of intensive hospitalization or surgery including, but not limited to, organ or bone marrow transplantations pursuant to Chapter 252:2 of the laws of 1993.

(b) The IPE shall contain information that is necessary for an individual to understand their rights, responsibilities, expected actions, service(s), service provider(s), and criteria to evaluate progress toward reaching the employment goal, including:

(1) The employment goal of the eligible individual based on assessments described in Ed 1005;

(2) Specific vocational rehabilitation services required and agreed to by the individual and the counselor to achieve the employment goal including the start and end dates for each service;

(3) A description of criteria to evaluate progress toward achievement of the employment goal such as timelines and a description of the steps or benchmarks to be reached by such timelines;

(4) The service provider(s);

(5) An explanation of the extent to which the individual and family are expected to contribute to the cost of services and the extent to which comparable benefits and services are available to the person receiving services;

(6) The responsibilities of the individual and the counselor to implement the IPE, such as the individual maintaining a particular attendance pattern during training, or contacting the counselor on an agreed upon schedule;

(7) Post-employment services that the individual is anticipated to need once employed;

(8) Information regarding the individual's rights and how to express and resolve any dissatisfaction through due process as described in Ed 1021; and

(9) Information regarding the availability of the local client assistance program.

Ed 1008.075 ***Options for*** Development of the Individualized Plan for Employment. The individualized plan for employment shall be developed in accordance with the provisions of 34 CFR 361.45.

(a) As soon as possible after determining eligibility, not to exceed 15 business days, the individual shall be notified in writing of the options available to the eligible individual for developing all or part of the IPE.

(b) The individual may combine any of the options, and take on a greater degree of responsibility for the IPE, or receive increased assistance from NHVR over the course of time. The individual shall choose one or more of the following methods to develop the IPE:

(1) Assistance from a NHVR counselor; and

(2) Technical assistance from other sources such as independent living centers, school guidance counselors, parents, friends, or community rehabilitation programs, which includes receiving a copy of the IPE.

(c) Regardless of the option chosen in (b) above, the counselor shall be responsible for reviewing and approving all IPEs, including any proposed changes, and shall provide counseling and guidance to the eligible individual.

(d) The individual shall be informed of:

(1) The required content or components of the IPE;

(2) An explanation that the counselor shall review and approve the IPE and that the IPE shall be signed by both the counselor and the eligible individual prior to implementation;

(3) The financial commitments for the services on the IPE, including information about NHVR policies on economic need, comparable benefits, and service purchase;

(4) Additional information the eligible individual requests or NHVR determines to be necessary to complete an IPE;

(5) The rights and responsibilities of the individual in carrying out the IPE, including remedies available through due process; and

(6) The availability of the Client Assistance Program (CAP) and how to contact the CAP provider.

Ed 1008.06 Counseling and Guidance During IPE Development.

(a) The counselor shall facilitate the development of the IPE by engaging the eligible individual through counseling and guidance to identify the employment goal and the steps and services needed to reach that goal.

(b) The counselor shall be responsible for reviewing and approving all IPEs, including any proposed changes.

(c) NHVR shall be responsible for coordinating and monitoring the services provided under the IPE.

(d) When jointly developing the IPE with the consumer, the counseling and guidance shall focus on options including, but not limited to:

(1) Exploring the impact of the disability and options and resources which can allow the individual to achieve an employment goal;

(2) Engaging in assessment activities that identify the individual's rehabilitation needs and help the individual make informed choices about employment options and the employment goal;

(3) Using current labor market information to help identify a potential employment goal;

(4) Identifying an employment goal consistent with abilities, interests, rehabilitation goals and labor market information;

(5) Developing positive employment attitudes and behaviors;

(6) Explaining services available through various community resources;

(7) Identifying needed services and coordinating referrals as appropriate;

(8) Developing job-seeking and networking skills; and

(9) Monitoring post-employment adjustment to determine need for additional services.

(e) When the eligible individual chooses to independently develop the IPE, NHVR shall be available to provide substantial technical assistance related to IPE development which shall include:

(1) Explaining the IPE process, procedures, and requirements of NHVR rules;

(2) Advising the individual on where to obtain information about careers, labor market information, and demand occupations;

(3) Identifying other sources of technical assistance, services, and funding; and

(4) Recommending potential service providers and sharing available information about their performance outcomes.

Ed 1008.07 Secondary Students with Disabilities.

(a) Students with disabilities shall be referred to NHVR by school districts when the school's assessment and planning process concerning the individual indicates that NHVR services shall be necessary, so long as the services are necessary for the students to successfully achieve employment, either immediately upon leaving school or following additional vocational training, postsecondary education, or other services.

(b) For students with disabilities who are not receiving special education services, NHVR staff shall work with school guidance counselors, nursing staff, or section 504 coordinators for appropriate referrals.

(c) Parents and students may directly apply for services from NHVR without a referral from the school.

(d) For students with disabilities receiving special education services who are determined eligible for vocational rehabilitation services, IPEs shall be developed prior to their exiting the secondary program, or within 90 days of eligibility determination, whichever occurs first.

(e) Students may require assessment services prior to identifying and employment goal and determining the specific vocational rehabilitation services in an IPE. In these circumstances, the NHVR counselor shall document the specific assessment activities and services conducted to develop the IPE and how this will affect the timeframe for IPE development.

(f) NHVR staff shall take the following steps in developing an IPE for a secondary student with disabilities:

(1) Review school information and reports to determine if there is transition information contained in the student's IEP, and if appropriate, include the information in the IPE, including, but not limited to:

a. Assessment information;

b. Employment goal; and

c. A description of vocationally-related services;

(2) The IPE shall reflect NHVR funded VR services if they contribute to the achievement of a post-school employment goal and are coordinated with the student's educational plan. The counselor shall determine that these services are required to enable the individual to achieve the post-school employment goal and that those specific VR services are not the program or fiscal responsibility of the school district; and

(3) The results of the planning by NHVR shall be made available to the school liaison, with signed release of information from the parent or adult student, as required. This coordination shall ensure that the student's IEP will contain school services that will contribute to the success of the student's plan.

Ed 1008.08 IPE and Supported Employment. *For individuals with the most significant disabilities for whom an employment goal in a supported employment setting has been determined to be appropriate, the IPE shall also include the following:*

(a) A description of the extended services needed, including natural supports when necessary;

(b) The source of extended services, or if not possible during the development of the IPE, an explanation of why there is reasonable expectation that such sources will be available; and

(c) Coordination of VR services with vocationally-relevant services provided under other individualized plans under related federal or state programs, which shall be documented in the record of services.

Ed 1008.09 IPE Documentation Requirements. *The following areas shall be documented in the case note, taking into account any opportunities that the individual has been afforded to exercise informed choice:*

(a) Employment goal development, including, but not limited to:

(1) The employment goal selected by the individual in developing the IPE;

(2) The rationale for that goal, based on the employment factors, as describe in Ed 1006.02;

(3) The results of assessment services;

(4) The alternatives that were considered by or with the individual;

(5) If applicable, the coordination with the individual education program (IEP), or if coordination with the IEP cannot be realized in the IPE, the case note should contain the reason;

(6) The level of integration in the employment goal; and

(7) Discussion of rehabilitation technology, accommodations, support services, and transportation considerations as appropriate;

(b) Service options, including, but not limited to:

(1) The rationale that describes why the planned services are required to reach the employment goal;

(2) Vocational rehabilitation services;

(3) The cost effectiveness of the service selected;

(4) Service providers;

(5) The level of integration in the settings in which services will be provided;

(6) The need for extended services; and

(7) The need for post-employment services;

(c) Comparable benefits that indicate the availability of resources that may be used to help pay the costs of vocational rehabilitation services;

(d) An indication of the result of, or the exemption from, the financial need determination when services are to be provided contingent on financial need as described in Ed 1006.

(e) Impact on financial benefits, including, but not limited to:

(1) A description of the availability of benefits counseling and work incentive planning and advisement resources, and the option for referral to these programs, as needed, concurrent with the implementation of the IPE;

(2) Employment earnings that may have an impact on supplemental security income (SSI), social security disability insurance (SSDI), temporary assistance for needy families (TANF), medicaid, medicare, housing subsidies, and other public benefits; and

(3) The availability of work incentive programs, including, but not limited to social security trial work period and on-going Medicaid coverage; and

(f) The need for the provision of assistive technology devices, assistive technology services, and personal assistance services, including training in the management of those services.

Ed 1008.10 Preparing the Original IPE.

(a) The original IPE shall be completed based on the existing information and comprehensive assessment that identifies the employment goal and the nature and scope of NHVR services.

(b) The IPE, or explanation of the IPE, shall be provided in the primary language or mode of communication of the eligible individual.

(c) When completing the “New Hampshire Vocational Rehabilitation Individualized Plan for Employment” form, revised August 2020, the NHVR counselor shall adhere to the following guidelines:

(1) The original IPE date shall be on or after the eligibility date, and on or before the start of services;

(2) The employment goal shall be as specific as possible;

(3) The anticipated month and year the eligible individual is expected to reach the employment goal shall include the 90-day employment period prior to case closure;

(4) Planned services shall be discussed with the eligible individual and all services that the individual may need during the rehabilitation process shall be included in the IPE;

(5) For supported employment services, the extended services provider and the funding source shall be entered on the IPE if known at the time. If a provider cannot be identified by the time the document is to be signed, but there is a reasonable expectation that such a provider will become available, then a description of the basis for concluding that there is a reasonable expectation that those sources will become available must be documented in the IPE;

(6) The services section shall contain specific information about the individualized vocational rehabilitation services, including support services such as transportation, interpreter services, and note taker services that shall be required to reach the employment

goal. All services shall be provided, as appropriate, in the most integrated setting. Vocational rehabilitation services or support services shall include:

- a. Those provided directly by NHVR staff, such as counseling and placement services;*
- b. Those authorized to service providers;*
- c. Those received by the individual as a comparable benefit; and*
- d. Those received by the individual through other organizations such as independent living centers, community rehabilitation programs, mental health clinics, or other treatment services when they are regarded as necessary for the successful completion of the IPE;*

(7) Identification of services on the IPE shall include:

- a. The specific vocational rehabilitation or support service;*
- b. The service provider;*
- c. The start and end dates of the service;*
- d. NHVR responsibility, or the estimated amount NHVR shall be responsible for;*
- e. The actual amounts known of comparable benefits;*
- f. Individual responsibility after the financial needs assessment and comparable benefits and services are determined; and*
- g. The estimated cost of services;*

(8) Criteria to evaluate progress shall be clearly stated and outlined as steps in the IPE. Each step shall specify a behavior or action and the evaluation criteria for that step. An expected date of completion for each step shall not be required, however eligible individual responsibilities, such as “participate in treatment services” or “advise your counselor of any change of medication” shall be itemized; and

(9) The rights and responsibilities section of the IPE shall contain preprinted information regarding both the individual and NHVR’s role in achieving the IPE. This includes information concerning the client assistance program, administrative reviews, mediation, and impartial hearings.

Ed 1008.11 Reviewing the IPE.

- (a) The IPE shall be reviewed as often as necessary, but at least annually.*
- (b) The eligible individual or the NHVR counselor may initiate a review of the IPE at any time.*
- (c) The results of any review shall be recorded in the “Plan Review Form”, revised August 2020.*

(d) If changes are initiated following a review, those changes shall be recorded in an amendment to the IPE.

(e) At least 30 days prior to the date of the annual review, the NHVR counselor shall communicate with the individual to schedule an IPE review.

Ed 1008.12 Changes to the IPE.

(a) Changes to the IPE shall occur at any time when agreed to by the eligible individual and the NHVR counselor.

(b) All changes shall be documented in the record of services by completing the “New Hampshire Vocational Rehabilitation Individualized Plan for Employment” form, revised August 2020 or the “New Hampshire Vocational Rehabilitation Amendment-Individualized Plan for Employment” form, revised August 2020.

(c) A case note shall be completed to indicate how the individual was involved in developing the changes.

(d) When making changes to the IPE, the individual has the same options enumerated in Ed 1008.05(b).

(d) Major changes to an IPE shall include, but not be limited to:

(1) A change in the employment goal, which may affect a change in the anticipated date of employment which shall be modified accordingly;

(2) An increase in the level of individual participation in the cost of services, if, as a result of a change in the IPE, the total expenditure that the individual is expected to contribute increases over the amount the individual contributed to the original IPE, or most recent major change if there was one;

(3) New services being added to the IPE; and

(4) A new provider of services.

(e) Minor changes to an IPE shall include, but not be limited to:

(1) Service start or end dates;

(2) The anticipated date of employment;

(3) The evaluation progress section of the IPE, which shall include the criteria to evaluate progress and any individualized consumer responsibilities that may be relevant;

(4) The types of services that the individual may need; and

(5) An increase in the cost of an authorized service that does not increase the level of consumer participation in the cost of services.

Ed 1008.13 IPE Approvals and Signatures.

(a) The NHVR counselor shall review and evaluate the proposed IPE and proposed changes to an IPE.

(b) The NHVR counselor shall evaluate the IPE to ensure:

(1) The employment goal is consistent with the individual's employment factors;

(2) The plan to reach the goal is feasible;

(3) Services are required to reach the employment goal;

(4) Services are cost effective; and

(5) NHVR policies and procedures are followed.

(c) If the IPE development is approved, NHVR shall prepare an original IPE or IPE Change Form as described in Ed 1008.11.

(d) Supervisory approval shall be required on the IPE if the IPE:

(1) Is developed by a NHVR counselor I;

(2) Includes services that require supervisory approval such as, but not limited to:

a. Graduate school training; or

b. Plans for self-employment; or

(3) Requires supervisory approval based on a plan for supervision.

(e) Once approved, the IPE or the IPE Change Form for major changes shall be signed by the counselor and supervisor, as required, and the individual.

(f) The individual shall be provided with a copy of the "New Hampshire Vocational Rehabilitation Individualized Plan for Employment" form, revised August 2020 or the "New Hampshire Vocational Rehabilitation Amendment-Individualized Plan for Employment" form, revised August 2020 within 10 days of the individual signing the document.

(g) The "New Hampshire Vocational Rehabilitation Individualized Plan for Employment" form, revised August 2020 or the "New Hampshire Vocational Rehabilitation Amendment-Individualized Plan for Employment" form, revised August 2020 shall be signed by both the individual and the NHVR counselor and supervisor, as required, before the initiation of services, except in an emergency situation where a delay in obtaining a signature would cause a significant delay in services.

Ed 108.0 Extended Evaluation for Certain Individuals with Significant Disabilities.

~~(a) If an individual cannot take advantage of trial work experiences or if options for trial work experiences have been exhausted before the designated state unit is able to make the determinations described in 34 CFR 361.42(e), the designated state unit shall conduct an extended evaluation to make these determinations.~~

~~(b) During the extended evaluation period, vocational rehabilitation services shall be provided in the most integrated setting possible, consistent with the informed choice and rehabilitation needs of the individual.~~

~~(c) During the extended evaluation period, the designated state unit shall develop a written plan for providing services necessary to make a determination.~~

~~(d) During the extended evaluation period, the designated state unit shall provide only those services that are necessary to make the determination and shall terminate extended evaluation services when the designated state unit is able to make the determination.~~

Ed 1008.09**15** Record of Services. The bureau shall maintain for each applicant and eligible individual a record of services that complies with the provisions of 34 CFR 361.47.

~~Ed 1008.10 Scope of Vocational Rehabilitation Services for Individuals with Disabilities. The scope of vocational rehabilitation services for individuals with disabilities shall comply with the provisions of 34 CFR 361.48 however they shall not include services prohibited by Chapter 252:2 of the laws of 1993 as set out in Ed 1008.13.~~

~~Ed 1008.11 Provision of Services for Individuals with Disabilities. The provision of services for individuals with disabilities shall comply with the provisions provided in 34 CFR 361.50.~~

PART Ed 1004**9** ~~ABILITY TO SERVE ALL ELIGIBLE INDIVIDUALS AND ORDER OF SELECTION~~

Ed 1004**9**.01 Determination, Establishment, and Implementation. The provisions under 34 CFR 361.36 shall be used to determine the ability to serve all eligible individuals or an order of selection in addition to the following:

(a) ~~The designated state unit~~ **NHVR** shall comply with the provisions of 34 CFR 361.36 to either:

- (1) Provide the full range of vocational rehabilitation services listed in 29 U.S.C. 723(a) ~~and Ed 1010.16~~, as appropriate, to all eligible individuals; or
- (2) In the event that vocational rehabilitation services cannot be provided to all eligible individuals who apply for the services, implement the order of selection established ~~in Ed 1006 to be followed~~ **in (e) below** in selecting eligible individuals to be provided vocational rehabilitation services;

(b) ~~The designated state unit~~ **NHVR** shall consult with the state rehabilitation council established under 34 CFR 361.16 that meets the requirements of 34 CFR 361.17 regarding the:

- (1) Need to establish an order of selection, including any reevaluation of the need as provided in Ed 1006.01(b);
- (2) Priority categories of the particular order of selection;
- (3) Criteria for determining individuals with the most significant disabilities; and
- (4) Administration of the order of selection;

(c) If the bureau determines that it does not need to establish an order of selection, the bureau shall reevaluate this determination in accordance with 34 CFR 361.36(b)(2);

(d) If ~~the designated state unit~~ **NHVR** establishes an order of selection, but determines that it does not need to implement that order at the beginning of the fiscal year, ~~the designated state unit~~ **NHVR** shall continue to meet the requirements of Ed 10059.01(c). If the ~~designated state unit~~ **NHVR** does not continue to meet the requirements of Ed 10059.01(c) it shall implement the order of selection by closing one or more priority categories;

(e) If, in accordance with 34 CFR 361.36, a determination is made that the bureau is unable to provide the full range of services to all eligible individuals, the ~~designated state unit~~ **NHVR** shall implement an order of selection for eligible individuals according to the following priority categories:

(1) Priority one shall include individuals who are determined to be eligible for services prior to the effective date of the implementation of the order of selection in accordance with 34 CFR 361.36(e)(3)(i), and individuals who are determined to be eligible for services after the effective date of the implementation of the order of selection and who are individuals with a most significant disability;

(2) Priority 2 shall include individuals with a significant disability ~~and public safety officers as defined in RSA 507:8 h, II who are disabled in the line of duty in law enforcement or protection of life or property and who are not included in priority one;~~ and

(3) Priority 3 shall include all other eligible individuals who do not have a significant disability;

(f) NHVR shall provide services to individuals who require specific services or equipment to maintain employment.

(g) NHVR shall continue to provide pre-employment transition services to students with disabilities who were receiving such services prior to being determined eligible for vocational rehabilitation services.

PART Ed 1007 INFORMATION AND REFERRAL SERVICES

Ed 10079.042 Referring Individuals Under an Order of Selection. The department shall comply with 34 CFR 361.37 to implement an information and referral system adequate to ensure that individuals with disabilities, including eligible individuals who do not meet the agency's order of selection criteria for receiving vocational rehabilitation services if the agency is operating on an order of selection, are provided accurate vocational rehabilitation information and **referral** guidance.

PART Ed 100510 COMPARABLE SERVICES AND BENEFITS

Ed 100510.01 Comparable Services and Benefits.

(a) The bureau NHVR shall comply with the provisions of 34 CFR 361.53 in the determination and use of comparable services and benefits.

(b) Comparable benefits and services shall be:

(1) Provided or paid for, in whole or in part, by other federal, state, or local public agencies, by health insurance, or by employee benefits;

(2) Available to the individual at the time needed to achieve the intermediate objectives in the IPE; and

(3) Commensurate to the services that the individual would otherwise receive from NHVR.

(d) NHVR shall make maximum efforts to determine whether comparable benefits and services are available to an individual prior to paying for all vocational rehabilitation services, excluding only those services and circumstances listed as exceptions in (f) below. NHVR staff and participants shall seek comparable benefits and services in order to maximize the vocational rehabilitation resources available to individuals with disabilities. If an individual refuses to apply for or accept available comparable benefits, NHVR funds shall not be substituted.

(e) NHVR staff shall first consider whether a service is currently available or obtainable through another program for which the individual is eligible and shall consider any number of the following:

(1) If benefits or services are available, they shall be used prior to using NHVR funds or services;

(2) If services or benefits are not currently available or if an individual is required to initiate a new application to another program, NHVR funds shall not be used in the interim unless, in the judgment of NHVR staff in consultation with the individual, waiting for benefits would prevent the individual from achieving the intermediate objectives of the IPE;

(3) If the determination of the availability of comparable services and benefits would delay services to an individual who is at extreme medical risk, as determined by an appropriate licensed medical professional; or

(4) If an immediate job placement would be lost due to a delay in the provision of such comparable benefits.

(f) Comparable benefits shall not be required for the following exempt services:

(1) Assessment services to determine eligibility and vocational rehabilitation needs;

(2) Counseling and guidance, including information and support services to assist an individual exercising informed choice;

(3) Referral and other services to secure needed services from other agencies;

(4) Job-related services, including job search and placement assistance, job retention services, follow-up services, and follow-along services;

(5) Rehabilitation technology, including telecommunications, sensory, and other technological aids and devices; and

(6) Post-employment services as noted above in (1) through (5).

(g) If an individual is in default of a student loan, financial aid including Pell shall not be available to the individual. NHVR shall be prohibited from paying for any training or related services at a post-secondary program eligible for Pell, including, but not limited to, colleges and business and

trade schools, for an individual who owes a refund on a grant or is in default of a student loan, unless the individual makes maximum effort to resolve the default. Maximum effort shall mean that the individual has worked out a satisfactory repayment plan with the lending institution or grantor and has re-established eligibility for financial aid.

(h) In making maximum effort to secure comparable benefits prior to using vocational rehabilitation funds, counselors shall:

(1) Acquire at least general knowledge about the nature of services available from other sources, their eligibility criteria, and the application and appeals process;

(2) Explore with the individual all possible sources of comparable benefits and assess, through discussion with the participant, the appropriateness of pursuing specific benefits or services and the availability of such benefits;

(3) Document in the case record the participant's application for benefits or the reasons NHVR funds are being used in place of benefits; and

(4) Monitor the application of benefits and assist the individual, if necessary.

(i) Individuals shall also exercise initiative in exploring the availability of and in securing the comparable benefits available to them, as appropriate to their disability. To do this they shall:

(1) Apply in a timely manner for all comparable benefits and services which are appropriate, with counselor assistance if necessary;

(2) Accept and use comparable benefits and services when available; and

(3) Inform the NHVR counselor of the status of any application and the receipt of denial of any comparable benefit.

PART Ed 100611 PARTICIPATION OF INDIVIDUALS IN COST OF SERVICES BASED ON FINANCIAL NEED

Ed 100611.01 Financial Needs Assessment.

(a) ~~The bureau~~ NHVR shall consider the financial need of eligible individuals ~~or of individuals who are planned to receive services through trial work experiences under 34 CFR 361.42(c) or during an extended evaluation under Ed 1010.08~~ that require a financial needs assessment. The financial needs assessment shall be used for determining the extent of the individual's participation in the costs of vocational rehabilitation services.

(b) Although eligible individuals shall require a financial needs assessment, not all NHVR services are based on financial need.

(c) There shall be a shared responsibility between the eligible individual and the NHVR counselor in determining financial need as follows:

(1) The eligible individual shall be responsible for providing their complete and accurate personal and household financial information to the NHVR counselor, including, but not limited to:

a. Most recent federal tax return;

b. SSI/SSD award letter;

c. Public assistance budget; and

d. Most recent pay stubs; and

(2) The NHVR counselor shall obtain, document, maintain, and safeguard the personal and household financial information required to review the individual's financial need and to calculate the extent of their participation in the cost of services

(d) A financial needs assessment shall be completed at least annually and if there is a significant change in the eligible individual's financial situation and they are receiving a financial need-based service.

(be) The financial needs assessment shall:

(1) Be applied uniformly to eligible individuals; and

(+2) Explain the method for determining the financial need of an eligible individual as follows:

a. The method shall be a review of the person's financial status; and

b. The method shall compare income and resources to determine the amount of monthly resources that shall be utilized for specific vocational rehabilitation services; and

*(zf) Specify the types of vocational rehabilitation services from the following services for which the bureau has established a financial needs test: **The following services shall not be provided until the participant has been determined to meet financial need and available resources have been applied toward the cost:***

a. All training services at college and vocational training programs, including, but not limited to, tuition, room and board, required fees, and required textbooks and materials;

ab. Physical and mental restoration;

bc. Vocational and other training services;

ed. Maintenance;

e. Driver training;

ef. Transportation, except during evaluation, special transportation, when used for the provision of pre-employment training services, and transportation to attend an administrative review or impartial hearing;

~~eg.~~ Vocational rehabilitation services to family members of an applicant or eligible individual if necessary to enable the applicant or eligible individual to achieve an employment ~~outcome~~ goal;

~~fh.~~ Supported employment services;

~~gi.~~ Post-employment services;

~~hj.~~ Occupational *and business* licenses, tools, equipment, initial stocks, and supplies;

k. Goods, inventory, equipment, and supplies for self-employment;

~~il.~~ Rehabilitation technology, including vehicular ~~are~~ modification, telecommunications, sensory, and other technological aids and devices;

m. Modifications to homes, vehicles, and worksites;

~~jn.~~ Transition services; ~~and~~

~~ko.~~ Technical assistance and other consultation services to conduct market analyses, develop business plans and otherwise provide resources, to the extent those resources are authorized to be provided through the statewide workforce investment system, to eligible individuals who are pursuing self-employment-; *and*

p. All other goods and services not exempt under (g) below.

(g) The following services provided by NHVR shall not require the consideration of an eligible individual's financial resources:

(1) All diagnostic, evaluation, and necessary services required during evaluation;

(2) Training provided by approved rehabilitation facilities;

(3) Special transportation required by individuals with significant disabilities;

(4) Driver and adaptive driver evaluations;

(5) Reader and note-taking services;

(6) Attendant or personal assistant services;

(7) Vocational counseling, guidance, and referral services;

(8) Core rehabilitation services including assessment, work readiness, pre-employment transition services for students to include any needed transportation, job placement, supported employment, rehabilitation technology, benefits advisement, and other adjunct services;

(9) On-the-job training;

(10) Any auxiliary aid or service required to participate in a vocational rehabilitation program.

(h) Non-financial need-based services maintain the same requirement to first use all available comparable benefits and services the individual is eligible to receive prior to applying NHVR funds, and to identify the most cost-effective service option.

(i) Eligible individuals are exempt from consideration of available resources who:

(1) Receive public benefits, including, but not limited to:

a. Temporary assistance for needy families (TANF); and

b. Aid to the permanently and totally disabled (APTD);

(2) Receive SSI; and

(3) Receive SSDI.

(j) Eligible individuals in accordance with (i)(1) above shall be determined to meet NHVR's financial need and are exempt from having available resources considered, however, NHVR shall provide funding for financial need-based services, up to the maximum contribution limits established, after all comparable benefits have first been applied.

~~Ed 1006.02 Services Exempt from Financial Needs Assessment. The bureau shall not apply a financial needs assessment or require the financial participation of the individual as a condition for furnishing the vocational rehabilitation services enumerated in 34 CFR 361.54(3).~~

PART Ed 1009~~12~~ STANDARDS FOR PROVIDERS OF SERVICES

Ed 1009~~12~~.01 Standards for Facilities and Providers of Services. The bureau shall comply with the provisions of 34 CFR 361.51 regarding the standards for facilities and providers of services including accessibility of facilities, affirmative action, and special communication needs personnel.

PART Ed 1010~~3~~ INFORMED CHOICE

Ed 1010~~3~~.01 Informed Choice. The bureau shall comply with the provisions of 34 CFR 361.52 to assist applicants and recipients of services in exercising informed choice throughout the rehabilitation process.

PART Ed 1011~~4~~ SEMI-ANNUAL AND ANNUAL REVIEW

Ed 1011~~4~~.01 Semi-Annual and Annual Review. The bureau shall comply with the provisions of 34 CFR 361.55 when conducting semi-annual and annual reviews.

PART Ed 1012~~5~~ REQUIREMENTS FOR CLOSING THE RECORD OF SERVICES OF AN INDIVIDUAL WHO HAS ACHIEVED AN EMPLOYMENT ~~OUTCOME~~ GOAL

Ed 1012~~5~~.01 Closing the Record of Services. The record of services of an individual who has achieved an employment ~~outcome~~ goal may be closed only if all of the requirements of 34 CFR 361.56 are met to include employment ~~outcome~~ goal achieved, employment ~~outcome~~ goal maintained, satisfactory outcome, and post-employment services.

PART Ed 1013~~6~~ SUPPORTED EMPLOYMENT SERVICES PROGRAM

Ed 10136.01 Purpose. The purpose of Ed 10136 is to develop and implement a collaborative program with appropriate entities, consistent with state and federal law, to provide a program of supported employment services for individuals with the most significant disabilities who require supported employment services to enter or retain competitive employment.

Ed 10136.02 Definitions. Except where the context makes another meaning manifest, the definitions in 34 CFR 363.6 have the meaning indicated when used in Ed 10156.

Ed 10136.03 Eligibility for Services. In order to be considered for services under the state supported employment services program, an individual shall:

(a) Be eligible for vocational rehabilitation services in accordance with the provisions of 34 CFR 361.42 and Ed 104006.03;

(b) Be an individual with the most significant disabilities; and

(c) Have supported employment identified as the appropriate rehabilitation objective for the individual on the basis of a comprehensive assessment of rehabilitation needs, including an evaluation of rehabilitation, career, and job needs.

Ed 10136.04 Authorized Activities. Activities authorized by the state supported employment services program shall include the following:

(a) A particularized assessment that is needed to supplement the assessment for determining eligibility and vocational rehabilitation needs done under 34 CFR 361.42 and that is provided subsequent to the development of the IPE in accordance with 34 CFR 363.4(a);

(b) Development of and placement in jobs for individuals with the most significant disabilities; and

(c) Supported employment services that are needed to support individuals with the most significant disabilities in employment including but not be limited to the following:

(1) Intensive on-the-job skills training and other training provided by skilled job trainers, co-workers, and other qualified individuals, and other services specified in the Act, 29 USC 701.103(a), in order to achieve and maintain job stability;

(2) Follow-up services, including regular contact with employers, trainees with the most significant disabilities, parents, guardians or other representatives of trainees, and other suitable professional and informed advisors in order to reinforce and stabilize the job placement; and

(3) Discrete post-employment services following transition that are unavailable from an extended services provider and that are necessary to maintain the job placement, such as job station redesign, repair and maintenance of assistive technology, and replacement of prosthetic and orthotic devices.

Ed 10136.05 Developing Collaborative Agreements.

(a) ~~The designated state unit~~ **NHVR** shall enter into one or more written cooperative agreements or memoranda of understanding with other state agencies, private nonprofit organizations, and other

available funding sources to ensure collaboration in a plan to provide supported employment services and extended services to individuals with the most significant disabilities.

(b) A cooperative agreement or memorandum of understanding shall, at a minimum, specify the following:

- (1) The supported employment services to be provided by ~~the designated state unit~~ **NHVR** with funds received under a federal grant for the state supported employment services program;
- (2) The extended services to be provided by state agencies, private nonprofit organizations, or other sources following the cessation of supported employment services under Ed 10136;
- (3) The estimated funds to be expended by the participating party or parties in implementing the agreement or memorandum; and
- (4) The projected number of individuals with the most significant disabilities who will receive supported employment services and extended services under the agreement or memorandum.

Ed 10136.06 Information Collection and Reporting Requirements.

(a) ~~The designated state unit~~ **NHVR** shall collect and report information as required under the Act, 29 USC 701.13, for each individual with the most significant disabilities served under the supported employment services program.

(b) ~~The designated state unit~~ **NHVR** shall collect and report separately information for:

- (1) Supported employment clients served under the supported employment services program; and
- (2) Supported employment clients served under.

Ed 10136.07 Coordinating Services and Activities. ~~The designated state unit~~ **NHVR** shall coordinate the services provided to an individual under Ed 10136 and under 34 CFR 361.48 and 34 CFR 361.49 to ensure that the services are complementary and not duplicative.

Ed 10136.08 Transition of an Individual to Extended Services. ~~The designated state unit~~ **NHVR** shall provide for the transition of an individual with the most significant disabilities to extended services no later than ~~18~~**24** months after placement in supported employment, unless a longer period is established in the IPE, and only if the individual has made substantial progress toward meeting the hours-per-week work goal provided for in the IPE, the individual is stabilized in the job, and extended services are available and can be provided without a hiatus in services.

Ed 10136.09 Requirements for Successfully Rehabilitating an Individual in Supported Employment. An individual with the most significant disabilities who is receiving supported employment services shall be considered to be successfully rehabilitated if the individual maintains a supported employment placement for 90 days after making the transition to extended services.

Ed 10136.10 Client Assistance Program. ~~The designated state unit~~ **NHVR** shall advise applicants for or recipients of services under Ed 10153, or as appropriate, the parents, family members, guardians, advocates, or authorized representatives of those individuals, of the availability and purposes of the Client

Assistance Program established in New Hampshire under the Act, 29 USC 701.112, including information on seeking assistance from that program.

PART Ed 10147 GENERAL PROVISIONS FOR INDEPENDENT LIVING SERVICES PROGRAM AND CENTERS FOR INDEPENDENT LIVING PROGRAM

Ed 10147.01 Purpose. The purpose of these rules is to provide uniform application of 45 CFR 1329 regarding state independent living services and centers for independent living.

Ed 10147.02 Definitions. The words defined in 45 CFR 1329.4 and 34 CFR 77.1, except where the context makes another meaning manifest, have the meaning indicated when used in Ed 1014:

Ed 10147.03 Requirements for Processing Referrals and Applications. The service provider shall apply the standards and procedures established by ~~the designated state unit~~ **NHVR** under Ed 10157.04 to handle referrals and applications for independent living (IL) services from individuals with significant disabilities.

Ed 10147.04 Requirements for Determining Eligibility.

(a) Before or at the same time that an applicant for IL services may begin receiving IL services funded under Ed 10147, the service provider shall determine the applicant's eligibility and maintain documentation that the applicant has met the basic requirements specified in ~~34 CFR 364.40~~ relative to assuring that any individual with a significant disability is eligible to receive IL services.

(b) The documentation for eligibility shall be dated and signed by a staff member of the service provider.

Ed 10147.05 Requirements for Determining Ineligibility.

(a) If a determination is made that an applicant for IL services is not an individual with a significant disability, the service provider shall provide documentation of the ineligibility determination that is dated and signed by a staff member.

(b) The service provider shall determine an applicant to be ineligible for IL services only after full consultation with the applicant or, if the applicant chooses, the applicant's parent, guardian, or other legally authorized advocate or representative, or after providing a clear opportunity for this consultation.

(c) The service provider shall notify the applicant in writing of the action taken for the ineligibility determination and inform the applicant or, if the applicant chooses, the applicant's parent, guardian, or other legally authorized advocate or representative, of the applicant's rights and the means by which the applicant may appeal the action taken.

(d) The service provider shall provide a detailed explanation of the availability and purposes of the Client Assistance Program established in New Hampshire under the Act, 29 USC 701.112, including information on how to contact the program.

(e) If appropriate, the service provider shall refer the applicant to other agencies and facilities, including ~~the designated state unit~~ **NHVR**.

Ed 10147.06 Review of Ineligibility Determination.

(a) If an applicant for IL services has been found ineligible, the service provider shall review the applicant's ineligibility at least once within 12 months after the ineligibility determination has been made and whenever the service provider determines that the applicant's status has materially changed.

(b) The review shall not be conducted in situations where the applicant has refused the review, the applicant is no longer present in New Hampshire, or the applicant's whereabouts is unknown.

Ed 10147.07 Requirements for an Independent Living Plan.

(a) Unless the individual who is to be provided IL services under Ed 1014 signs a waiver in accordance with Ed 10147.07(b), the service provider, in collaboration with the individual with a significant disability, shall develop and periodically review an IL plan for the individual in accordance with the requirements in Ed 10147.08-Ed 10147.11.

(b) The requirements of Ed 10147.07 with respect to an IL plan shall not apply if the individual knowingly and voluntarily signs a waiver stating that an IL plan is unnecessary.

(c) Subject to Ed 10147.07(b), the service provider shall provide each IL service in accordance with the IL plan.

Ed 10147.08 Initiation and Development of an Independent Living Plan.

(a) Development of an individual's IL plan shall be initiated after documentation of eligibility under Ed 10147.04(a) and shall indicate the goals or objectives established, the services to be provided, and the anticipated duration of the service program and each component service.

(b) The IL plan shall be developed jointly and signed by a staff member of the service provider and the individual with a significant disability or, if the individual chooses, by the individual's guardian, parent, or other legally authorized advocate or representative.

(c) A copy of the IL plan, and any amendments, shall be provided in an accessible format to the individual with a significant disability that uses appropriate modes of communication consistent with the informed choice of the individual.

Ed 10147.09 Review.

(a) The IL plan shall be reviewed as often as necessary but at least on an annual basis to determine whether services should be continued, modified, or discontinued, or whether the individual should be referred to a program of vocational rehabilitation services under ~~Ed 1010.15 and Ed 1010.16~~ 34 CFR 361.48 and 34 CFR 361.50 or to any other program of assistance.

(b) Each individual with a significant disability or, if consistent with state law and the individual chooses, the individual's guardian, parent, or other legally authorized advocate or representative, shall be given an opportunity to review the IL plan and, if necessary, jointly redevelop and agree by signature to its terms.

Ed 10147.10 Coordination with Vocational Rehabilitation, Developmental Disabilities, and Special Education Programs. The development of the IL plan and the provision of IL services shall be coordinated to the maximum extent possible with any individualized:

(a) Written rehabilitation program for vocational rehabilitation services for that individual;

(b) Habilitation program for the individual prepared under the Developmental Disabilities Assistance and Bill of Rights Act, 42 USC 15001; and

(c) Education program for the individual prepared under part B of the Individuals with Disabilities Education Act, 34 CFR 300 and 303.

Ed 10147.11 Termination of Services. If the service provider intends to terminate services to an individual receiving IL services under an IL plan, the service provider shall follow the procedures in Ed 10147.05(c)-(e) and Ed 10147.06.

Ed 10147.12 Maintaining Records for the Individual.

(a) For each applicant for IL services other than information and referral and for each individual receiving IL services other than information and referral, the service provider shall maintain a service record that includes:

- (1) Documentation concerning eligibility or ineligibility for services;
- (2) The services requested by the applicant or individual;
- (3) Either the IL plan developed with the applicant or individual or a waiver signed by the applicant or individual stating that an IL plan is unnecessary;
- (4) The services actually provided to the applicant or individual; and
- (5) The IL goals or objectives:
 - a. Established with the applicant or individual, whether or not in the applicant's or individual's IL plan; and
 - b. Achieved by the applicant or individual.

(b) A service record for an applicant and an individual shall be maintained either electronically or in written form, except that the IL plan and waiver shall be in writing.

Ed 10147.13 Durational Limitations on Independent Living Services. The service provider shall not impose any uniform durational limitations on the provision of IL services, except as otherwise provided by federal law or regulation.

Ed 10147.14 Standards for Service Providers. In providing IL services to individuals with significant disabilities, service providers shall comply with:

(a) The written standards for IL service providers established by ~~the designated state unit~~ **NHVR** pursuant to Ed 1017.05; and

(b) All applicable state or federal licensure or certification requirements.

Ed 10147.15 Use of Personal Information by Service Providers.

(a) All personal information in the possession of the service provider shall be used only for the purposes directly connected with the provision of IL services.

(b) Information containing identifiable personal information shall not be shared with advisory or other bodies that do not have official responsibility for the provision of IL services.

(c) In the provision of IL services or the administration of the IL program under which IL services are provided, the service provider shall only obtain personal information from other service providers and cooperating agencies under assurances that the information shall not be further divulged, except as provided under Ed 10147.16 and Ed 10147.17.

Ed 10147.16 Release of Personal Information to Recipients of Independent Living Services.

(a) Except as provided in Ed 10147.16(b) and (c), if requested in writing by a recipient of IL services, the service provider shall release all information in that individual's record of services to the individual or the individual's legally authorized representative.

(b) Medical, psychological, or other information that the service provider determines may be harmful to the individual shall not be released directly to the individual, but shall be provided through a qualified medical or psychological professional or the individual's legally authorized representative.

(c) If personal information has been obtained from another agency or organization, it shall be released only by, or under the conditions established by, the other agency or organization.

Ed 10147.17 Release of Personal Information for Audit, Evaluation, and Research.

(a) Personal information may be released to an organization, agency, or individual engaged in audit, evaluation, or research activities subject to the provisions of Ed 10147.17(b).

(b) Personal information shall be released only if the organization, agency, or individual assures that:

- (1) The information will be used only for the purposes for which it is being provided;
- (2) The information will be released only to persons officially connected with the audit, evaluation, or research;
- (3) The information will not be released to the involved individual;
- (4) The information will be managed in a manner to safeguard confidentiality; and
- (5) The final product will not reveal any personally identifying information without the informed written consent of the involved individual or the individual's legally authorized representative.

Ed 10147.18 Release to Other Programs or Authorities.

(a) Upon receiving the informed written consent of the individual or, if appropriate, the individual's legally authorized representative, the service provider shall release personal information to another agency or organization for the latter's program purposes only to the extent that the information is released to the involved individual under Ed 10147.16 and only to the extent that the other agency or organization demonstrates that the information requested is necessary for the proper administration of its program.

(b) Medical or psychological information shall be released under Ed 10147.18(a) only if the other agency or organization assures the service provider that the information will be used only for the purpose for which it is being provided and will not be further released to the individual.

(c) The service provider shall release personal information if required by federal laws or regulations.

(d) The service provider shall release personal information in response to investigations in connection with law enforcement, fraud, or abuse, unless expressly prohibited by federal or state laws or regulations, and in response to judicial order.

(e) The service provider also shall release personal information to protect the individual or others if the individual poses a threat to his or her safety or to the safety of others.

Ed 10147.19 Review Procedures Available to Individuals.

(a) The review procedures in Ed 1021 shall be available to an individual to request and receive a timely review of any adverse decision made by the service provider concerning the individual's request for IL services or the provision of IL services to the individual.

(b) Each service provider shall inform each individual who seeks or is receiving IL services from the service provider about the review procedures required by Ed 10147.19(a). The information about the review procedures shall be in an accessible format that uses appropriate modes of communication consistent with the informed choice of the individual.

PART Ed 10158 INDEPENDENT LIVING SERVICES FOR OLDER INDIVIDUALS WHO ARE BLIND

Ed 10158.01 Purpose. The purpose of the independent living (IL) services for older individuals who are blind program is to support projects that:

(a) Provide any of the IL services to older individuals who are blind that are described in 34 CFR 367.3(b);

(b) Conduct activities that will improve or expand services for older individuals who are blind; and

(c) Conduct activities to help improve public understanding of the problems of older individuals who are blind.

Ed 10158.02 Definitions. Except where the context makes another meaning manifest, the definitions in 34 CFR 367.5 have the meaning indicated when used in Ed 10158:

Ed 10158.03 Services for Older Individuals Who Are Blind. For the purposes of Ed 10158.01(a), IL services for older individuals who are blind shall include:

(a) Services to help correct blindness that include:

(1) Outreach services;

(2) Visual screening;

- (3) Surgical or therapeutic treatment to prevent, correct, or modify disabling eye conditions; and
- (4) Hospitalization related to these services;
- (b) The provision of eyeglasses and other visual aids;
- (c) The provision of services and equipment to assist an older individual who is blind to become more mobile and more self-sufficient;
- (d) Mobility training, Braille instruction, and other services and equipment to help an older individual who is blind adjust to blindness;
- (e) Guide services, reader services, and transportation;
- (f) Any other appropriate service designed to assist an older individual who is blind in coping with daily living activities, including supportive services and rehabilitation teaching services; and
- (g) IL skills training, information and referral services, peer counseling, and individual advocacy training;

Ed 10158.04 Administering the Program.

- (a) ~~The designated state unit~~ **NHVR** shall administer the program in Ed 10158 in order to carry out the purposes listed in Ed 10158.01 either directly or through:
 - (1) Grants to public or private nonprofit agencies or organizations; or
 - (2) Contracts with individuals, entities, or organizations that are not public or private nonprofit agencies or organizations.
- (b) Notwithstanding Ed 10158.04(a), ~~the designated state unit~~ **NHVR** may enter into assistance contracts with public or private nonprofit agencies or organizations.
- (c) Notwithstanding Ed 10158.04(a), ~~the designated state unit~~ **NHVR** shall not enter into procurement contracts with public or private nonprofit agencies or organizations.

PART Ed 10169 NEW HAMPSHIRE BUSINESS ENTERPRISE PROGRAM

Ed 10169.01 Purpose. The purpose of the New Hampshire Business Enterprise Program (BEP) is to support self-employment for individuals who are legally blind through career opportunities in cafeteria, snack bar, and vending services ***provide blind persons with remunerative employment, enlarging the economic opportunities for the blind, and stimulating the blind to strive to make them self-supporting.*** The New Hampshire department of Education, through the BEP of the office of services for blind and visually impaired, (SBVI) ~~is the~~ ***shall be the*** state licensing agency (SLA) for legally blind individuals who operate food and vending service facilities on federal, state, and other properties.

Ed 1019.02 Authority. The implementation of agreed-upon policies, standards, and procedures affecting the overall operation of the vending facilities program shall be subject to review by the committee, as defined in Ed 1019.03(m). SBVI bears final authority and responsibility for the administration and operation of the vending facilities program.

Ed 1016~~9.023~~ Definitions. Except where the context makes another meaning manifest, the definitions in 34 CFR 395.1 *and Ed 1002.01* have the meaning indicated when used in Ed 1016, *in addition to the following*:

(a) *“Active participation” means an ongoing process of negotiations between SBVI and the committee to achieve joint planning and approval of program policies, standards, and procedures affecting the overall operation of the vending facilities program, prior to their implementation by SBVI;*

(b) *Individual who is legally blind” means a blind person as defined in 34 CFR 361.1(c);*

(f) *“Manager” means an individual who is legally blind who is licensed to operate a vending facility on federal or other property.*

(i) *“Program” means the New Hampshire business enterprise program in the department of education.*

(j) *“Roster” means a list of all qualified candidates who have successfully completed and all Business Enterprises training requirements and are awaiting and eligible for assignment to a vacant vending facility.*

(l) *“Services for blind and vision impaired (SBVI)” means “Blind Services” as defined in 186-B:10-II.*

(m) *“State committee of licensed managers (the committee)” means an officially constituted body within State government, functioning as an integral part of the State's business enterprises program. The committee shall be consist of all licensed managers and shall carry out its duties in accordance with 34 C.F.R. § 395.14.*

Ed 1016.03 Issuance of Vending Facility Licenses.

(a) ~~SBVI shall license qualified candidates to operate vending facilities on federal, state, and other property in accordance with Ed 1016.045.~~

(b) ~~Licenses shall be issued only to qualified individuals who are legally blind and on the roster.~~

Ed 1016~~9.04~~ Licensing Procedure*Issuance of Vending Facility Manager Licenses.*

(a) *SBVI shall issue licenses only to an individual who is:*

(1) A citizen of the United States;

(2) Legally blind as defined in Ed 1019.03(b); and

(3) Qualified to operate a vending facility by evidence of having successfully completed training prescribed by SBVI or by virtue of demonstrated experience.

(a) ~~The licensing procedure shall be as follows:~~

~~(1) SBVI shall maintain a roster of blind persons who are eligible and who desire to qualify as vending facility operators;~~

(2b) Preference shall be given to qualified candidates who:

a.(1) Are in need of employment; **and**

b.(2) Are residents of the state of New Hampshire; **and**

e. Have the experience and training for the location on which they are bidding; **and**.

~~(3) In selecting a candidate who is deemed appropriate to enter the BEP training program, SBVI shall focus on the candidates' individual skills, abilities, and personal qualifications especially suited to the operation of a vending facility as determined by materials submitted by the individual and/or VR counselor if applicable, including but not limited to evaluation reports, educational background, work experience, and resumes. The candidate shall also meet with the committee chair and administrator of SBVI during the initial interview phase of the acceptance process.~~

(c) Candidates, who have satisfactorily completed the training and probationary period described in Ed 1019.05 and Ed 1019.06, shall be issued a manager license.

Ed 1016.4505 Training Program and Probationary Period.

(a) All ~~operator~~**manager** candidates shall complete a training program in accordance with the training plan developed by SBVI. The training program shall include evaluation and training in blind/low vision rehabilitation as well as formal classroom instruction and on the job training on an individual basis.

(b) The training program will generally be no less than 6 months but may take longer if individual situations require, provided that the candidate is showing successful progress. ***In selecting a candidate who is deemed appropriate to enter the BEP training program, SBVI shall focus on the candidates' individual skills, abilities, and personal qualifications especially suited to the operation of a vending facility as determined by materials submitted by the individual and/or VR counselor if applicable, including but not limited to evaluation reports, educational background, work experience, and resumes.***

(c) SBVI shall document that the candidate possesses the necessary skills to function as an independent blind person and the aptitude to be a successful business owner.

(d) The candidate shall meet with the committee chair and administrator of SBVI during the initial interview phase of the acceptance process.

(e) After considering all available information including the interview and recommendation of the committee chair, the administrator shall make the decision as to whether or not to accept the candidate into the training.

(f) Training shall be developed by SBVI with the active participation of the committee, as defined in Ed 1019.03(m), and shall consist of a standardized training curriculum combined with on-the-job training in areas that shall include, but not be limited to:

(1) Health and sanitation;

(2) Customer service;

(3) Vending management;

- (4) Café management;*
- (5) Marketing;*
- (6) Human resources;*
- (7) Business processes;*
- (8) Accounting;*
- (9) Randolph-Sheppard Act; and*
- (10) State rules and regulations.*

~~(b)~~ Candidates, who have been accepted and have satisfactorily completed the training program in Ed 1016.15, *prescribed by SBVI* shall be placed on a roster.

Ed 1019.06 Probationary Candidates (Individuals on the Roster).

~~(a)~~ When a location becomes available for bid, an individual on the roster may bid along with the licensed operator ~~managers~~.

~~(b)~~ *A candidate from the roster who is awarded a first location* There shall ~~be~~ *serve* a probationary period not to exceed 6 months ~~for candidates taken from the roster when awarded a first location.~~

~~(c)~~ At the end of the probationary period a candidate who is acceptable to SBVI and wishes to remain in the program shall be issued a license based on the following criteria:

- (1) The candidate receives satisfactory evaluation reports as acknowledged by SBVI, and these reports have been reviewed with the VR counselor if applicable and the committee chair; and
- (2) The evaluation reports attest that the candidate effectively demonstrates the ability to:
 - a. Provide good customer service;
 - b. Maintain proper food service sanitation standards;
 - c. Understand the principles of:
 - 1. Product inventory control;
 - 2. Daily cash control;
 - 3. Banking procedures;
 - 4. Proper licensing procedures; and
 - 5. Submission of city, state and federal taxes; and

d. Maintain the required monthly profit and loss reports.

~~(fd)~~ A candidate whose performance is not acceptable to SBVI shall not be licensed by SBVI and shall be removed from the program when the candidate fails to meet the criteria listed in Ed 1019.16.07(b) during the training or the probationary periods.

(g) Licenses shall be issued to the ~~operator~~ **manager** by SBVI for an indefinite period. ~~Licenses and~~ shall be subject to termination as provided in Ed 1016.05.

~~(h) SBVI shall select operators for vending facilities. Generally one operator will be selected, however, 2 operators may bid jointly on a location. Two co-operators may be selected by SBVI when a facility has sufficient earning power to adequately support more than one operator. Such selection shall be approved by a majority vote of the licensed operators in the state. Preference for a bid shall be towards a single operator unless it is deemed the location will be more adequately serviced by joint operators or an operator and assistant.~~

~~(i) Operators selected shall be compatible and mutually acceptable to each other, with compensation determined on a profit-sharing basis agreeable to the operators concerned and SBVI.~~

~~(j) Candidates, who have satisfactorily completed the probationary period and who have completed the training program in Ed 1016.15, shall be issued a license.~~

~~(k) The administrative appeal of any licensing decision made under this section shall be pursuant to Ed 1016.18 (a),(2).~~

Ed 1016.1407 Transfers and Promotions of **Licensed OperatorsManagers**. The following procedures shall apply to transfer and promotion of operators:

(a) When a location becomes available for bid, the vacancy shall be announced to all licensed managers and individuals on the roster.

(b) When an opportunity to bid on a location is announced, a manager may bid or not bid without prejudice to future consideration of a subsequent bid by the potential applicant.

(c) Some vending facilities, in accordance with requirements of a particular property management, might require security clearances or drug screenings as a condition for being assigned.

(d) Any manager who is in probationary status as outlined in Ed 1019.06, has not completed the continuing education requirements set forth in Ed 1019.16, or is delinquent with respect to filing any reports or had any indebtedness to the BEP or State of New Hampshire at the time of the vacancy announcement shall not be permitted to bid for the vacancy.

~~(ae) A selection committee shall be convened by the administrator of SBVI when new opportunities become available for promotion or transfer. The selections committee shall include a representative of the state committee of licensed operatorsmanagers assigned by the chair or co-chairs, the BEP coordinator, the program assistant coordinator, and a counselor from the designated state agency's office of and a SBVI representative appointed by the SBVI administrator. The duties of the committee shall be to oversee and manage the provisions of Ed 1016.14(b) (f) relative to the transfer and promotion of operators.~~

(f) The selection committee shall interview all candidates who submit a bid and score the candidates using the following criteria:

- (1) Record of performance for the past two years;*
 - (2) The manager's plan for the new business including a business plan if applicable;*
 - (3) Responses to interview questions; and*
 - (4) Personal appearance, demeanor, and attitude.*
- (g) After considering all criteria, each review committee member shall award points to the candidates as follows:*
- (1) First choice, 3 points;*
 - (2) Second choice, 2 points; and*
 - (3) Third choice, 1 point.*
- (h) The BEP program coordinator shall total up the points and the candidate with the most points shall be awarded the facility. In the event of a tie, the candidate with the most seniority shall be awarded the facility.*
- ~~(b) Each operator shall be given every possible opportunity by way of the bidding process for promotion to facilities of greater earning capacity or more convenient location or both, as the knowledge skills and abilities of the individual are developed.~~
- ~~(ei) When experience has proven that an operator manager, who SBVI has determined is committed to the successful operation of their vending facility, is assigned to a location or locations beyond the operator manager's capacities, the operator manager shall be given opportunities for training. However if training does not result in improved operation performance, an assignment to a location commensurate with the operator manager's ability shall be made pending the availability of such a location or locations. If no such facility is available, the manager's name shall be placed on the roster. Alternatively the number and nature of the facilities that the operator manages shall be reviewed and modified accordingly.~~
- ~~(d) When an opportunity to bid on a location is announced an operator may bid or not bid without prejudice to future consideration if another opportunity occurs that will be advantageous to the operator.~~
- (ej) An operator manager shall not be assigned to a facility of lesser income or convenient location without an explanation and an evidentiary hearing if requested by the operator manager.*
- (k) If no qualified manager has submitted a bid on a vacant vending facility, the program, with active participation of the committee, as defined in Ed 1019.03(m), shall:*
- (1) Assign the vending facility on a temporary basis to a licensed manager assigned to another vending facility;*
 - (2) Enter into a third party agreement with a private entity with the commissions being used in accordance with any state or federal regulations to perpetuate the program. Such agreements shall not exceed one year but are subject to renewal if no manager is still available to manage the vending facility; or*

(3) Permanently attach the vending facility to another vending facility being managed by a licensed manager if it is evident that the location will never sustain a manager nor will there be an opportunity in the foreseeable future to use the location when creating a vending route.

~~(f) Promotion to facilities of greater capacity and earning power shall be applied using the following criteria:~~

~~(1) Past performances at vending locations; and~~

~~(2) Active participation in such things as training events, ongoing training opportunities, committee meetings, bid reviews; and~~

~~(3) Seniority.~~

Ed 10169.058 ~~Partnerships~~ **Teaming Arrangements.**

~~(a) An operator~~ ***manager*** may enter into a ~~partnership~~ ***teaming arrangement*** with a private vendor only when the following criteria are met:

~~(1a) The operator~~ ***manager*** initiating a ~~partnership~~ ***teaming arrangement*** shall have made a qualified bid on the location in response to a bid notification by SBVI; ~~and~~

~~(2b) The operator~~ ***manager*** shall demonstrate his or her active role in the ~~partnership~~ ***day-to-day operation of the business*** as the person responsible for all reports and accountabilities under applicable federal and state laws and regulations;;

~~(c) The financial arrangements are acceptable to the program and not less than the manager could make if they managed the vending facility independently; and~~

~~(d) The written agreement has been reviewed and approved by the program.~~

~~(b) If no other qualified single or joint operator bid has been submitted, the development of a partnership agreement with another entity by the single bidder shall be considered for approval by SBVI.~~

Ed 10169.069 **Vending Routes.**

(a) Individual vending routes ~~may~~ ***shall*** be established ***by the program*** when deemed appropriate by SBVI, only when accepted by the state committee of licensed ~~operator~~ ***managers*** by a simple majority vote.

~~(b) A proposal for the establishment of a vending route may be brought to SBVI and/or the committee by individual operators or other interested parties.~~

~~(c) Once a vending route has been established it shall remain an intact route. In the event that the operator~~ ***manager*** no longer wishes to, or cannot, serve one or more of the locations on the established vending route the vending route as a whole shall go out to bid as a single vending location. To alter the composition of a vending route requires the submission of a ~~new written~~ ***proposal consistent with this section which shall be jointly approved by the program and the state committee of licensed managers.***

Ed 10169.0910 **Maintenance and Replacement of Equipment.** ~~The following procedures shall apply to the maintenance and replacement of equipment:~~

~~(a) Except as provided in Ed 1016.07(b), (c), and (d), SBVI shall not be responsible for repair and maintenance of equipment after such equipment is furnished to the vending facilities;~~

~~(b)~~ (a) SBVI shall be responsible for repair and maintenance of equipment for the first 4 months after such equipment is furnished to the vending facilities when:

- ~~(1) A new operator~~ **manager** begins operating a vending facility;
- ~~(2) An operator~~ **manager** transfers to a different vending facility; or
- ~~(3) An operator~~ **manager** adds a new vending facility;

(b) After the initial 4-month period referenced in (a) above, the manager shall be assessed a \$100 deductible on each repair call.

~~(c) The operators shall bear the responsibility for repair and maintenance of equipment in their respective facilities after the time limits in Ed 1016.07(b) expire;~~

~~(d) SBVI shall review repairs and maintenance that exceed \$500.~~

~~(e)~~ (c) The final decision **SBVI** shall **replace a piece of equipment** be based upon funds available and the following criteria:

- ~~(1) If it is deemed to be more cost effective to repair, SBVI shall do so~~ **replace, and the manager has called in a repair;** ~~or~~
- ~~(2) If it is more efficient to replace the unit, SBVI shall cover the full expense of the replacement;~~

~~(f)~~ (d) **If SBVI becomes aware of malfunctioning equipment and the manager has not called in a repair**, SBVI shall repair and maintain or cause to be repaired and maintained any equipment in need of repair and maintenance in order to keep the facility operable and in an attractive condition, **after** reasonable notice if the operator fails to do so under Ed 1016.09(d)(1); **and the manager shall be assessed the full amount of the repair charge.**

~~(g) The operators shall be assessed the amounts needed to repair and maintain equipment when SBVI has undertaken the responsibility in (d)(2) above; and~~

~~(h) SBVI shall replace equipment that it determines to be worn out or obsolete. If the licensed operator feels that equipment should be replaced, the operator shall make a request to this effect. SBVI shall fulfill requests based on priority and urgency of all requests.~~

Ed 1016.10 Operator Ownership of Vending Facilities:

~~(a) If the operator desires to purchase part of the operator's own equipment and retain title thereto, the operator shall be responsible for repair and maintenance of such equipment to assure that the vending facility shall be kept operational and in an attractive condition.~~

~~(b) If the operator owner ceases to be an operator or transfers to another vending facility site, ownership of the equipment shall become vested in SBVI and transferred to a successor operator subject~~

~~to an obligation on SBVI's part to pay to such operator owner or the operator's estate the fair value of the operator owned equipment.~~

~~(c) The operator owner, operator's personal representative or next of kin shall be entitled to an opportunity for an administrative review and an evidentiary hearing under Ed 1016.15 with respect to the determination of the amount to be paid by SBVI for an operator's ownership in the equipment. When the operator owner is dissatisfied with any decision rendered as a result of the evidentiary hearing, the operator owner may file a complaint with the Secretary under 34 CFR 395.13 to request the convening of an ad hoc arbitration panel.~~

~~(d) If an operator desires to retain title to vending facility equipment which the operator has purchased SBVI shall enter into a written agreement with such operator owner delineating conditions of ownership.~~

~~(e) No person shall be denied the opportunity to become an operator because of their unwillingness or inability to purchase the vending facility equipment or the initial stock.~~

Ed 10169.11 Setting Aside of Funds.

(a) SBVI shall set aside funds from the net proceeds of the operation of vending facilities and vending machine income to the extent necessary for the following purposes:

(1) Maintenance and replacement of equipment;

(2) Purchase of new *or replacement* equipment;

(3) Management services ~~such as but not limited to:~~

~~a. Ongoing training;~~

~~b. Upward mobility training;~~

~~c. Food service related education;~~

~~d. Liability insurance; and~~

~~e. Annual dues in vending and food service organization; and as defined in Ed 34 CFR 395.1(j), including training and continuing education for managers;~~

(4) Retirement and pension funds, health insurance contributions, paid sick leave and vacation time if it is determined by a majority vote of the ~~operators~~ *managers* licensed by SBVI to contribute and use funds set aside for these purposes after SBVI provides each ~~operator~~ *manager* information on all matters relevant to such funds; *and*

(5) The establishment of a fair minimum return.

(b) The charge for each purpose listed in Ed 10169.11(a) shall be determined by SBVI with the active participation of the state committee of licensed ~~operator~~ *managers* and shall be designed to prevent, so far as is practicable, a greater charge than is reasonably required. SBVI shall maintain adequate records to support the reasonableness of the charges, including any reserves necessary to assure that these purposes can be achieved on a consistent basis.

(c) The amount of funds set aside Ed 10169.11(a) shall:

(1) Be assessed monthly; and

(2) Be a percentage of net proceeds of the monthly profit and loss statement provided that:

a. The ~~operator~~**manager** has net proceeds before set aside of over \$1,700 for that month; and

b. Either:

1. The set aside charge does not reduce the net proceeds below \$1,700; or

2. In order to assure a fair minimum return to ~~operator~~**managers**, any set aside assessment which lowers an ~~operator~~**manager**'s net proceeds below \$ 1,700 for that month shall be reduced by the amount required to raise the net proceeds to \$1,700.

(d) The percentage in Ed 10169.11(c) shall be ~~10%~~ **a percentage** of net proceeds assessed in Ed 1016.11(a) and shall be reviewed every 2 years by SBVI with the active participation of the committee of licensed ~~operators~~**managers**. The new percentage shall be set utilizing the running average balance of the set aside account over the previous 2-year period, the Consumer Price Index and projected needs.

(e) If the set aside percentage is changed, SBVI shall submit the change to the Secretary for approval prior to implementation.

Ed 10164.12 Distribution and Use of Income from Vending Machines on Federal Property.

(a) Vending machine income from vending machines on federal property which has been disbursed to SBVI by a property managing department, agency or instrumentality of the United States under 34 CFR 395.32 shall:

(1) Accrue to each ~~operator~~**manager** operating a vending facility on such federal property in New Hampshire in an amount not to exceed the average net income of the total number of ~~operators~~ **manager** within the state, as determined each fiscal year on the basis of each prior year's operation; and

(2) Not accrue to any ~~operator~~**manager** in any amount exceeding the average net income of the total number of ~~operators~~ **managers** in the United States.

(b) No ~~operator~~**manager** shall receive less vending machine income than an ~~operator~~**manager** was receiving during the calendar year prior to January 1, 1974, as a direct result of any limitation imposed on such income under Ed 10169.12 as provided in 34 CFR 395.8(a).

(c) No limitation shall be imposed on income from vending machines, combined to create a vending facility, when the facility is maintained, serviced, or operated by an ~~operator~~**manager**.

(d) Vending machine income disbursed by a property managing department, agency or instrumentality of the United States to SBVI in excess of the amounts eligible to accrue to ~~operator~~**managers** in accordance with Ed 10169.12 shall be retained by SBVI.

(e) SBVI shall disburse vending machine income to ~~operator~~**managers** within the state on at least a quarterly basis.

(f) Vending machine income which is retained by SBVI under Ed 1016**9**.12 shall be used for:

- (1) The establishment and maintenance of retirement or pension plans;
- (2) Health insurance contributions; and
- (3) The provision of paid sick leave and vacation time for ~~operator~~**managers**, if it is so determined by a majority vote of ~~operator~~**managers** licensed by SBVI, after SBVI has provided to each ~~operator~~**manager** information on all matters relevant to such purposes.

(g) Any vending machine income not necessary for the purposes in Ed 1016**9**.12(f) shall be used by SBVI for maintenance and replacement of equipment, purchase of new equipment, management services, and assuring a fair minimum return to ~~operator~~**managers**. ***Any amounts used for these purposes shall require a reduction in set aside in an equal amount on a pro rata basis.***

(h) In the even SBVI determines that a vending location is not suitable for a blind manager, SBVI can arrange vending services through a third party. Income that accrues to SBVI as a result shall be used to:

- (1) Purchase new equipment;***
- (2) Replace equipment as needed;***
- (3) Purchase merchandise inventory;***
- (4) Provide training for managers; or***
- (e) Establish retirement, health insurance, vacation, or sick pay plans.***

Ed 1016**9**.13 Operating Agreement Between SBVI and ~~Operator~~**Manager**. ~~To obtain a license to operate one or more vending locations, the operator shall agree to the rules in Ed 1016 as well as the terms and conditions under which the license is issued in accordance with the following:~~

(a) Before assuming management of one or more vending facilities, a manager shall enter into an operating agreement with SBVI. The terms and conditions shall take the form of an operating agreement shall set forth the terms and conditions and state between the operator and SBVI stating what responsibilities of both the ~~operator~~**manager** has and what responsibilities and SBVI has.

(b) The agreement shall include:

- (1) The ~~operator~~**manager**'s name;
- (2) The vending facility name and location;
- (3) The hours of operation for the vending facility;
- (4) The articles to be sold at the vending facility;
- (5) The insurance requirements for the vending facility;

- (6) The financial records that must be kept by the ~~operator~~**manager**; and
 - (7) The rights and obligations of the ~~operator~~**manager** and SBVI relative to assignments, subcontracts, and default.
- (c) The agreement shall contain but not be limited to the following items adapted to the individual conditions applying to the specific location:
- (1) The duties of the ~~operator~~**manager** and the performance of such duties in accordance with ~~standards prescribed by~~**the following**:
 - a. SBVI ~~and~~ **rules, policies, and standards** developed with the active participation of the state committee of ~~operator~~**managers**;
 - b. Applicable health laws and regulations;
 - c. Terms of the permit granted by, or the contract entered into with, the federal or other agency or organization in control of the site of the vending facility; and
 - d. Security clearance requirements for the vending facility such as the process to obtain access cards. This may include background checks and security clearance applications for the ~~operator~~**manager** and their employees or partners. If a licensed ~~operator~~**manager** cannot receive clearance for a particular location, the location **shall** be released from the ~~operator~~**manager** and put out to bid, ***unless the manager had not assumed management of the facility and there is an opportunity to award it to the next highest ranked candidate pursuant to Ed 1019.07;***
 - (2) The responsibilities of SBVI to provide management services to the ~~operator~~**manager** including assistance and supervision, and the ways in which such responsibilities shall be carried out;
 - (3) A statement that ***the operator***~~manager~~ shall receive the net proceeds from the vending facility that the ~~operator~~**manager** operates;
 - (4) The responsibility of the ~~operator~~**manager** to furnish:
 - a. A monthly profit and loss statement that includes payment for assessed set asides no later than the last day of the month following the close of the previous month's accounting period;
 - b. One copy each of business liability insurance and workers compensation insurance; and
 - c. One copy of automobile collision and liability insurance in the case of ~~operator~~**managers** with vending delivery vehicles;
 - (5) The right of the ~~operator~~**manager** to terminate the operating agreement at any time;
 - (6) The termination of the operating agreement upon termination of the permit or contract; and

- (7) The termination or revocation of the operating agreement upon the failure of the ~~operator~~**manager** to operate the vending facility in accordance with the operating agreement or applicable federal, state, or local laws or regulations.
- (d) The ~~operator~~**manager** and the administrator of SBVI shall both sign the agreement.

Ed 1019.14 Performance Probation.

(a) Licensed managers shall be placed on performance probation when SBVI determines that the vending facility is not being operated in accordance with:

- (1) The rules and regulations governing the program pursuant to Ed 1019;*
 - (2) The terms and conditions of the permit or contract;*
 - (3) The terms and conditions of the operating agreement;*
 - (4) State law, the violation of which is, or reasonably may, result in financial or physical harm to the customers of the facility or other persons, the department or the manager; or*
 - (5) Regulations of other agencies of the State of New Hampshire which have regulatory authority directly related to the operation of a vending facility.*
- (b) A written notice of performance probation shall state the reason(s) for probation, steps to be taken, if any, to avoid termination, and the manager's right to appeal SVBI's action pursuant to Ed 1019.15.*
- (c) The probationary period shall be in effect for 30 days from the date of a written notification as follows:*

- (1) If hand delivered, the program representative shall document that the notice has been received by the manager as evidenced by a signed acknowledgment of receipt. The thirty (30) day probationary period begins on the date the manager acknowledges receipt;*
 - (2) If sent by way of U.S. mail, the notice shall be sent certified mail with return receipt requested. The thirty (30) day probationary period begins on the date the manager signs the return receipt; or*
 - (3) If sent via email, it will be sent to an email address provided by the manager for all official correspondence. The thirty (30) day probationary period begins on the date the email is sent.*
- (d) Managers who are placed on performance probation pursuant to Ed 1019(a) will not be permitted to bid on vacant vending facilities.*

(e) If a manager is placed on disciplinary probation for the same offense for the third time during a twelve (12) month period, the manager's license will be terminated.

Ed 1019.15 Removal of an Manager.

(a) If a manager determines that it is in their best interest to withdraw from a permanently or temporarily assigned facility, the manager may do so and shall be immediately placed on the roster if

the withdrawal is not for the purpose of avoiding disciplinary action. 30 days written notice shall be provided. In the case of such a withdrawal, there shall be no accrual of seniority.

(b) SBVI shall remove a manager from a facility if circumstances prevent an manager from fulfilling their obligations. Prior to or within 24 hours of the removal, SBVI shall contact the Committee chair and inform them of the action.

(c) In those facilities that require security clearance by property management, the manager shall meet all such security requirements in order to service a vending facility in such locations. In the event property management rescinds security clearance for a manager for any reason, SBVI shall remove the manager from that facility. SBVI shall investigate and consult with property management regarding security clearance reinstatement. If the security clearance is not reinstated, the removal shall be permanent.

(d) In the event of the documented misconduct by the manager jeopardizing the existence of the facility or the image of the program or if SBVI reasonably determines there is a hazardous situation involving the manager which poses an immediate threat to the safety of the manager or others, SBVI shall declare that emergency circumstances exist, whereupon the manager shall be immediately removed. In the case of such removal, the committee chair shall be advised of the action prior to or within 24 hours of the removal.

(e) Any involuntary removal of a manager is subject to appeal pursuant to Ed 1019.18.

(f) In the event of a manager's removal under paragraphs (b), (c), (d), or (e) of this section, SBVI shall, within ten (10) working days, do one of the following:

- (1) Return the manager to the vending facility;*
- (2) Mandate re-training;*
- (3) Place the manager's name on the roster;*
- (4) Assign the manager to a vending facility with lesser sales and less responsibility; or*
- (5) Initiate disciplinary action against the manager.*

(g) In lieu of removing a manager from a facility, if SBVI determines that the manager has made a good faith effort to perform all duties required, SBVI shall relieve the manager of responsibility for a portion of the facility if such action would enable the manager to fulfill their obligations in the remaining areas that they service. This provision shall only be applicable if a vending facility has multiple locations and relieving the manager of responsibility for one or more of the locations will help the manager manage the main facility.

(h) When a manager is operating a facility on property not protected under federal or state law with respect to a statutory priority or preference, SBVI shall, upon the request of property management, be required to remove the manager from the facility, but SBVI is bound to proceed in accordance with the terms and conditions of the permit. If the removal is a result of violation(s) of the rules, SBVI shall initiate disciplinary proceedings as appropriate. If the removal is not as a result of a violation of the rules, SBVI shall place the manager's name on the roster.

(ba) A license issued to an ~~operator~~**operatormanager** shall be terminated after affording the ~~operator~~**operatormanager** an opportunity for an administrative review, an evidentiary hearing, and arbitration under Ed 10169.15, when one or more of the following conditions apply:

(1) When vision is improved so that the ~~operator~~**operatormanager** no longer meets the definition of an individual who is legally blind;

(2) When there is extended illness with medically documented diagnosis of prolonged incapacity of the ~~operator~~**operatormanager** to operate the vending facility in a manner consistent with the needs of the location or other available locations in the vending facility program;

(3) *When the manager withdraws from the program;*

(34) When SBVI finds that a vending facility is not being operated in accordance with ~~the Ed 1016;~~

a. The provisions of Ed 1019;

b. The (4) ~~When the operator does not comply with the~~ terms and conditions contained in the licensing agreement between the ~~operator~~**operatormanager** and SBVI;

c. (5) ~~When the operator does not comply with~~ **The** terms and conditions of the vending facility's **permit or** contract **between** SBVI and the manager of the property on which the vending facility is located; ~~and/or~~

d. State or federal statutes or regulations of other agencies with jurisdiction over vending facilities.

(6) When the ~~operator~~**operatormanager** withdraws from the program.

(ab) **15 days prior to termination**, ~~W~~ritten notice shall be given to any ~~operator~~**operatormanager** whose license is to be terminated or who is in jeopardy of losing the license, including a statement of the reason. Such notice shall:

(1) ~~also i~~Inform the ~~operator~~**operatormanager** of the ~~operator~~**operatormanager**'s right to request an administrative review, an evidentiary hearing, and arbitration under Ed 10169.15; **and**

(2) **Be hand-delivered or sent via US mail with a signed receipt requested.**

~~Ed 10169.0817 Vending Facility Equipment and Initial Stock. The following procedures shall apply to vending facility equipment and initial stocks of merchandise:~~

(a) SBVI shall furnish each vending facility with adequate, suitable equipment and initial stocks of merchandise sufficient for the establishment and operation of the facility for an initial 2 week period. If the ~~operator~~**operatormanager** obtaining the agreement to operate the location is on the roster or in a probationary period per Ed 10169.045, ~~he or she~~ **the manager** shall not be eligible to obtain additional locations or inventory until a license has been obtained.

(b) If a licensed ~~operator~~**operatormanager** is provided with initial inventory for a new ~~location~~ **assignment**, it shall be sufficient to operate the location for no more than a 2 week period. The funds used shall be as an interest free loan ~~from the set aside account~~. SBVI shall establish a monthly payment plan to begin 3

months after the ~~operator~~**manager** has ~~been providing full service at~~**been assigned and assumed management of** the location.

(c) The right, title to and interest in the equipment of each vending facility used in the program and in the initial stocks of merchandise shall be vested in accordance with the laws of the state in either the name of SBVI or the ~~operator~~**manager**.

Ed 1019.18 Continuing Education and Upward Mobility.

(a) Each licensed manager and each candidate on the roster shall complete 10 continuing education or upward mobility credits every 2 calendar years.

(b) Credits shall be awarded in accordance with Table 1019-1:

Continuing Education/Upward Mobility Type	Credits Awarded
Annual training sponsored by the committee or program	3
Consumer driven regional or national training	4
On-Line training approved by the Program in advance	2
On-Line Webinars approved by the Program in advance	1
State or regional food shows	2
State conventions sponsored by consumer groups	1
National conventions sponsored by consumer groups	3
College level course in business related field	10
Other training as determined by the Program and Committee	TBD

(c) If, by December 31 of the second year, the manager has not fulfilled the training requirement, the program will so advise the manager and shall grant a 90 day extension to complete all requirements. If after 60 days of the extension the manager has not completed the necessary training, SBVI shall place the manager on performance probation in accordance with Ed 1019.16. If at the end of the probationary period the manager still has not completed the necessary training, SBVI shall terminate the manager's license and remove them as the manager of their vending facility. The SBVI administer has the authority to grant additional time to complete the necessary training if extreme circumstances exist. Such extension of time must be approved by the state committee of licensed managers.

(d) To the extent funds are available, SBVI shall provide financial assistance to managers who show evidence of financial need in order to complete the training. If funds are not available, SBVI shall make every effort to provide committee or program sponsored training at no cost to the manager.

Ed 1019.19 Manager Secured Locations.

(a) Managers may seek out new locations on properties not protected by any state or federal priority or preference. If a manager, identifies a potential location and property management is willing to allow the manager to establish a vending facility, the manager shall notify the program coordinator who shall conduct a survey to determine the feasibility of establishing a vending facility. If the results of the survey are favorable and funds are available, SBVI shall enter into an agreement with the entity. The location shall be added to the one being managed by the manager. If the manager bids on and is awarded a different facility, SBVI will determine on an individual basis, with the active participation of the state committee of licensed managers, to either leave the location attached to the current facility or allow the manager to take it with them to their new facility.

(b) Nothing in this part shall obligate SBVI to establish a vending facility at a site secured by an manager.

Ed 10169.14620 Election, Organization, and Functions of State Committee of Licensed Operator **Managers**.

(a) The ~~operator~~**managers** licensed by the state shall comprise the membership of the state committee of licensed ~~operator~~**managers**.

(b) Pursuant to 34 CFR 395.14, the committee shall:

(1) Actively participate with SBVI in major administrative decisions, including rule, policy development, and program development decisions affecting the overall administration of the state's vending facility program;

(2) Receive and transmit to SBVI all grievances at the request of managers and serve as advocates for such managers in connection with such grievances;

(3) Actively participate with SBVI in the development and administration of a state system of transfer and promotion of managers;

(4) Actively participate with SBVI in the development of training and retraining programs for managers; and

(5) Sponsor, with the assistance of SBVI, meetings and instructional conferences for managers within the State.

~~(bc)~~ The committee chairperson shall be elected by a majority vote of committee members. The chairperson shall be elected every 2 years and serve 2 years. ~~The chairperson shall not succeed him or herself. The election shall also include an election for an alternate~~**a vice-chair that may succeed him or herself. The alternate chair** **who** shall assume the responsibilities of the chair if the chair is unable to attend to his or her duties.

~~(ed)~~ Quarterly meetings shall be held between the committee and SBVI to discuss policy, administrative ~~changes~~ **matters** affecting the program, provide a training opportunity, and carry on other business of the committee and/or SBVI, **as needed. The chair has the authority to call special meetings in between quarterly meetings as necessary.**

~~(de)~~ Between the regular meetings individual committee members shall be designated, or sub-committees established, by the chair(s) to carry on the functions of the committee.

~~(ef)~~ All written material pertaining to the administration of the program shall be provided to the chairperson of the committee by SBVI in a format that is accessible by the chairperson(s). **SBVI shall distribute the materials to all members of the committee upon approval by the committee chair affording the committee an opportunity to actively participate** ~~When in policy or major administrative changes.~~

(g) If, after affording the committee with an opportunity as described in (f) above, a consensus cannot be achieved, that have been discussed with the committee members cannot be adopted, the chairperson(s) of the committee shall be notified in writing stating the reasons therefore, prior to implementation of the changes by SBVI. The committee shall receive and transmit to SBVI grievances at the request of operators and serve as advocates for such grievances.

Ed 10169.4721 Administrative Reviews, Evidentiary Hearings, and Arbitration of Operator Manager Complaints. If an ~~operator~~**manager or the committee** is aggrieved by any action of SBVI with regard to the administration of the program the ~~operator~~**manager** may file a written complaint to resolve the matter as follows:

(a) If the blind ~~operator~~**manager** and SBVI agree, the dispute may be submitted to ~~the designated state unit~~**the department's** administrator for policy and law for review and decision using the following criteria:

- (1) The decision to elect informal dispute resolution shall not preclude the blind ~~operator~~**manager** from seeking an evidentiary hearing if the informal dispute resolution process does not resolve the matter to the ~~operator~~**manager's** satisfaction;
- (2) The decision from an informal dispute resolution session may not be used in an evidentiary hearing;
- (3) In the case of disputes involving candidates for a license, pursuant to Ed 10169.046, the parties shall submit the dispute to said administrator. The decision rendered shall represent the final administrative remedy for issues arising out of the licensing process;
- (4) A request for an administrative dispute resolution session shall be filed with SBVI within 15 business days of action out of which the dispute arises;
- (5) Within 10 business days, the administrator shall set a date and time for the parties to present their case. The hearing itself shall be held within 30 days of the request having been made;
- (6) The administrator shall render a decision in writing in the matter within 14 calendar days of the completion of the hearing;
- (7) The decision shall include:
 - a. The facts and law relied on to make the decision; and
 - b. A rationale for the decision, based on the information submitted; and
- (8) An ~~operator~~**manager** aggrieved **who is dissatisfied with** ~~by~~ the administrator's decision may request an evidentiary hearing within 10 business days from the receipt of the administrator's report.

(b) Evidentiary hearings shall comply with the following:

- (1) The ~~operator~~**manager** shall make written application for an evidentiary hearing to the office of legislation and hearings and state the reasons for such application, within 15 days after the occurrence of the condition which caused the ~~operator~~**manager** to file the request for an evidentiary hearing, or as prescribed in Ed 1016.4721, (a)(8) when appealing the decision of an informal dispute resolution process;
- (2) The ~~operator~~**manager** shall be advised of the following:
 - a. The date, time, and place the hearing will be held;

- b. That the hearing will be held within 15 days after receipt of application and at a time and place reasonably convenient to the ~~operator~~**manager**;
- c. The right to be represented or accompanied at the hearing by counsel, friends, and witnesses;
- d. The right to adequate opportunity to present the ~~operator~~**manager**'s case;
- e. The right to give evidence pertinent to the issue involved;
- f. The right to cross examine witnesses appearing against the ~~operator~~**manager**; and
- g. The request for a full evidentiary hearing indicates consent by the ~~operator~~**manager** for the release of information necessary for the conduct of the hearing;

(3) The hearing shall be conducted by a hearing officer, assigned by the office of legislation and hearings within the department of education pursuant to Ed 200;

(4) Within 15 working days of completion of the hearing, the hearing officer shall prepare an official written report and recommendations to the director of ~~the designated state unit~~**NHVR**;

(5) The director of ~~the designated state unit~~**NHVR**, within 5 working days of receipt of the report, shall review the report and make a final decision which shall constitute the official action in regard to the subject of the hearing. The decision shall be:

- a. In writing and shall set forth the issue, the relevant facts brought out at the hearing, the pertinent provisions in law and the division policy, and the reasoning that led to the decision; and
- b. Forwarded to the ~~operator~~**manager** immediately upon its issuance and a copy shall be furnished to ~~the designated state unit~~**NHVR**; and

(6) Reasonable accommodations for disability(ies) shall be arranged by ~~the designated state unit~~**NHVR** for the ~~operator~~**manager** at the ~~operator~~**manager**'s request.

(c) ~~Persons aggrieved by~~ **Licensed managers who are dissatisfied with** a decision **or any action arising out of a** ~~of the designated state unit in an evidentiary hearing under Ed 10169.4521(b)~~ may appeal as follows:

- (1) In accordance with RSA 541 for causes of action arising out of the action or operation of the program pursuant to RSA 186-B:13, I; or
- (2) In accordance with 20 U.S.C. §107d-2 for causes of action arising out of the action or operation of the program pursuant to 20 U.S.C. §107e (3) or 23 U.S.C. §111.

Ed 10169.4822 Access to Program and Financial Information. Each ~~operator~~**manager** shall be provided access to all financial data of SBVI relevant to the operation of the program, including quarterly and annual financial reports, provided that such disclosure does not violate applicable federal or state laws pertaining to disclosure of confidential information. At the request of an ~~operator~~**manager**, SBVI shall arrange a convenient time to assist in interpretation of such financial data.

Ed 1016.1923 ~~Operator~~ **Manager** and SBVI Responsibilities.

(a) Each ~~operator~~ **manager** shall submit to SBVI a monthly operating statement along with the set aside assessment detailing, among other things, gross sales, purchases, operating costs, and net profits. Forms for this purpose shall be furnished to each ~~operator~~ **manager** by SBVI. SBVI shall retain complete access to the ~~operator~~ **manager's** records.

(b) The ~~operator~~ **manager** shall:

(1) Perform faithfully and to the best of ~~operator~~ **manager's** ability the necessary duties in connection with the operation of the vending facility in accordance with ~~the department~~ **SBVI's rules, as well as rules of other applicable state and federal agencies;**

(2) Cooperate with officials and duly authorized representatives of SBVI in connection with their official program responsibilities;

(3) Operate the vending facility in accordance with all applicable health laws and regulations, **and maintain a clean appearance at all times;**

~~(4) Abide by as well as the regulations and policies of the agency controlling the property upon which the facility is located; and~~

(5) Comply with all terms of the permit including maintaining the agreed upon hours; and

~~(46) Furnish such reports as SBVI may from time to time require.~~

(c) SBVI shall assume responsibility for providing ~~to operators such supervision and assistance as may be necessary to insure the operation of each vending facility in the most productive and efficient manner possible~~

(1) Management services as defined in 34 CFR 395.1(j);

(2) Supervision to ensure the effective operation of the vending facility;

(3) New and replacement equipment as necessary for the successful operation of the vending facility;

(4) Maintenance and repair of equipment; and

(5) Initial stock.

Ed 1016.204 State Licensing Rules. SBVI shall furnish a copy of the state licensing rules to each candidate or ~~operator~~ **manager** in addition to all written documents pertaining to the administration and management of the program.

Ed 1019.25 Responsibilities of Vending Facilities.

(a) Unless otherwise exempted by Title XV, Section 186-B, any properties owned or leased by the state shall recognize the rights granted to SBVI to establish vending facilities on such properties. SBVI shall be permitted to conduct surveys of state-owned or leased properties to determine the feasibility of establishing one or more vending facilities on a particular property. No state entity is permitted to enter into an agreement with a third party for a vending facility unless a determination is made by SBVI that

it cannot provide services of a high quality at reasonable prices. Property management shall take all necessary steps to insure that the installation occurs, and that the space and the utilities required are provided at no cost to the SBVI or the manager for the operation, except telephone or internet service. SBVI shall provide the necessary alterations, plumbing and equipment, merchandise, a licensed manager, and the appropriate supervision of the manager.

(b) In the event that existing buildings are purchased or leased, or new buildings are constructed by any state entity, written notice shall be given to SBVI in ample time to afford the BEP an opportunity to make plans to provide the service.

(c) All vending facility operations shall be governed by an agreement between SBVI and property management, known as a permit. The permit shall include the location, type of facility, space available, all necessary equipment and the operating hours of the facility. In the negotiation process between the Agency and property management regarding either the terms and conditions of an occupancy permit or a contract, the Committee shall have an opportunity to participate in making final determinations with respect to the terms and conditions of an occupancy permit or contract. The terms and conditions of the permit may be changed after consultation with the manager for purposes of soliciting their input. Once the changes have been made, the revised document shall be provided to the manager. The absence of an executed permit does not relieve a manager of their responsibilities to otherwise comply with these rules and regulations and/or to provide effective management of the vending facility.

(d) Property management may not require the payment of rent, utilities, or commissions as a condition for operating a vending facility on its property. However, at its discretion and with the active participation of the state committee of licensed managers, may negotiate less restrictive agreements that do require such payments. If such payments are negotiated and are included in the permit agreement, the licensed manager will be obligated to make such payments; however, no subsequent priority is waived either expressly or by implication.

(e) If SBVI determines that a site is suitable for a blind person, it may negotiate an agreement with a third party vendor to provide services.

PART Ed 104720 INTERPRETER CLASSIFICATION SYSTEM

Ed 104720.01 Purpose. The purpose of the classification system program shall be to evaluate competency skills of sign language interpreters, to maintain records of interpreter classification, and to maintain records of continuing education units required for maintenance of classification.

Ed 104720.02 Program Designation. This program shall be designated "The New Hampshire Interpreter Classification System" (NHICS).

Ed 104720.03 Classification. An individual who applies for and meets the requirements for classification under Ed 1017.10 shall be qualified as a sign language interpreter by the program for the deaf and hard of hearing of the department.

Ed 104720.04 Applicability; Administration of Classification System Program. These rules shall apply to the classification process for sign language interpreters as conducted and managed by the program for the deaf and hard of hearing, division of career technology and adult learning, vocational rehabilitation, department. The classification system program shall be managed by a coordinator appointed by the director of the division of career technology and adult learning.

Ed 104720.05 Definitions. The following terms are defined for the purposes of part Ed 1017:

(a) “Deaf Interpreter” means a person who is deaf and provides interpreting services as defined in section (e), below

(b) “Director” means the director of the division of career technology and adult learning.

(c) “Classification system program” means the New Hampshire interpreter classification system operated by the coordinator.

(d) “Coordinator” means the person appointed by the program for the deaf and hard of hearing, division of career technology and adult learning, vocational rehabilitation, department to coordinate the classification.

(e) “Interpreting” means the process of converting spoken English into American Sign Language (ASL) and the process of converting ASL into spoken English.

(f) “Rater” means an individual who has successfully completed training approved under Ed 1017.12 by the program for the deaf and hard of hearing in the evaluation of interpreter skills.

(g) “State classification test” means the test administered under Ed 1017.08 for the purposes of determining an interpreter’s classification as a qualified interpreter under Ed 1017.10.

(h) “Rater stipend” means the appropriate level payment made to the rater for their work.

~~Ed 1047~~**20.06** Administration of State Classification Test; Classification Fees.

(a) The state classification test for the purpose of classifying interpreters shall be administered at least once every 6 months, unless there have been no requests for a test. If 3 or more individuals request a test, a test shall be scheduled at a date sooner than the next regularly scheduled test.

(b) The fee for the state classification test shall be \$225.00.

(c) A re-test fee of \$140 shall allow a retake of the performance test by an applicant for initial classification within one year after passing the structured interview portion.

(d) Applicants shall obtain a refund for a scheduled state classification test when providing at least 30 days’ advance written notification of cancellation to the coordinator. Otherwise, test fees shall be nonrefundable.

(e) The coordinator or designee shall collect fees and maintain receipt records and invoices from raters and expenses incurred by the program for:

(1) Rater and interviewer stipends for the evaluation of candidates

(2) The cost of the interpreter for the deaf or hard of hearing rater during the testing process; and

(3) Testing equipment.

~~Ed 1047~~**20.07** Application Process.

(a) Applicants shall contact the program for the deaf and hard of hearing for an information packet which contains:

- (1) A description of the classification process;
- (2) An application form;
- (3) A description of the fee charged for testing; and
- (4) A description of the appeal procedure.

(b) Each applicant shall submit an application and the fee for the test. Individuals shall not take the test until payment and a complete application are received, and the application is approved as complete by the coordinator or designee.

(c) The coordinator or designee shall notify each applicant who has submitted an application approved as complete of the scheduled date, time, and place for the test.

Ed 104720.08 State Classification Test.

(a) The state classification test shall consist of 2 sections. Section one shall be a structured interview scored by a minimum of 4 raters. Section 2 shall be a pass/fail performance test scored by a minimum of 4 raters.

(b) The structured interview shall be pass/fail and demonstrate the following:

- (1) Knowledge of and ability to make practical use of the code of professional conduct of the RID;
- (2) Knowledge of the role and responsibilities of an interpreter;
- (3) Understanding of professional business practices, including the limitations of an interpreter's role, diplomacy required of an interpreter, and the need for attire that enhances the background for signing such as plain clothing and jewelry that does not distract from the interpreting process;
- (4) Communication skills in ASL and English; and
- (5) The interpreter's overall professional presentation.

(c) The performance test shall consist of an interpreting dialogue, preceded by a warm-up.

(d) Each applicant's performance on sections 1 and 2 of the test shall be videotaped.

(e) The performance test scoring sheet shall consist of a numerical rating covering the following areas:

- (1) The rater's ability to comprehend the applicant, based on the applicant's clarity, use of grammar, level of discourse, and use of classifiers;
- (2) The message equivalency transmitted by the applicant, including:
 - a. Message accuracy;

- b. Accurate use of morphology;
 - c. Use of affect and register of the original message; and
 - d. The amount of information transmitted;
- (3) The interpreting process, including:
- a. Phrasing; and
 - b. Process management; and
- (4) The applicant's professionalism, including:
- a. Composure; and
 - b. Objectivity.

Ed 104720.09 Administration of State Classification Test.

(a) The coordinator or designee shall videotape section 1, the interview, and section 2, the performance portion, of the test.

(b) The coordinator or designee shall send the rater scoring packet to 4 qualified raters within one week of the taping. The coordinator shall make sure each packet includes a copy of the candidates tape, scoring sheets and the rater instruction information.

(c) Candidates who pass both the performance section and the interview section will be state classified and notified.

(d) Candidates who successfully pass the performance portion of the test but do not successfully pass the interview portion of the test shall not be considered for state classification. They shall need to retake both sections of the test.

(e) The coordinator shall mail to each applicant who has completed the performance test written notice of the test results within one month of the date of the test.

(f) A person who fails either the structured interview or the performance test may request from the coordinator, in writing, copies of the raters' scoring sheets. The coordinator shall supply such sheets, upon written request.

(g) Applicants for initial classification not passing the performance test may retake the performance portion of the test, within one year after passing the structured interview portion.

Ed 104720.10 Classification of Interpreters. An applicant shall be classified as a qualified sign language interpreter who:

- (a) Has a high school diploma or its equivalent;
- (b) Is 18 years of age or older; and
- (c) Receives a score of 75% or more on the performance test.

Ed 104720.11 Maintenance of Classification.

(a) “Continuing education units,” for the purpose of this rule means:

- (1) Participation in professional workshops sponsored by a post-secondary interpreter training program, the RID, the National Association of the Deaf (NAD) or the state chapters of such organizations, or any other professional training organization which focus on issues related to the deaf community and/or the interpreting process;
- (2) Conventions/conferences of either deafness or interpreting organizations;
- (3) Tutoring sessions, if such sessions are qualified under paragraph (b); and
- (4) For the 20% required in areas not related to deafness or interpreting, participation in a course, workshop, or training session on a topic unrelated to deafness, but which has an impact on the interpreter’s activities as a sign language interpreter.

(b) To qualify, a tutoring session shall be provided by RID certified interpreters those who hold their NIC, Certificate of Interpretation (CI) or NAD level V.

(c) Classification as a qualified interpreter under Ed 1017.10 shall be valid for 6 years from date of issue.

(d) All state-classified interpreters shall earn CEU’s. The number of CEU’s earned shall be the same number of hours as those required by RID over each 4 year period, 80% of which shall be deafness/interpreting related, and 20% of which shall be either deafness/interpreting related or in other areas as defined in Ed 1017.11(a)(4). CEU hours shall be awarded based on clock hours of participation and shall require documentation from such training programs such as an agenda, conference packet, or syllabus. No one convention, workshop or course shall be used to satisfy the entire requirement.

(e) Determination of compliance with Ed 1017.11(e) shall be made by the coordinator of the program for the deaf and hard of hearing.

(f) An individual’s classification shall lapse for an individual who fails to obtain national certification before the expiration of the 6-year classification period. The individual shall no longer be:

- (1) Listed in the department of education’s directory of interpreters for the deaf; and
- (2) Considered a licensed interpreter by the state of New Hampshire.

Ed 104720.12 Raters.

(a) Each team of raters shall be comprised of 2 raters who can hear and 2 raters who are deaf or hard of hearing. Raters who can hear shall possess a valid certification from RID or the NAD level V. The program for the deaf and hard of hearing shall solicit applicants from certified interpreters and the deaf community. Selection shall be made by the program for the deaf and hard of hearing based on skill level, availability and experience.

(b) The program for the deaf and hard of hearing shall provide rater training for new raters. New raters shall complete the rater training, which shall consist of instruction and materials on the principles of interpreter classification evaluation, practice tapes, and inter-rater reliability data.

(c) A rater shall not have a conflict of interest regarding the person to be rated. A conflict of interest shall be deemed to exist if the person to be rated is a member of the rater's immediate family. "Immediate family" means the rater's spouse, parent, mother-in-law, father-in-law, sibling, sister-in-law, brother-in-law, or child, or anyone related to the rater by blood or marriage and living in the same household as the rater. The rater shall disclose any other circumstances which create a conflict of interest as to a particular person, and shall withdraw as a rater for that person. The rater shall also disclose to the coordinator any circumstances likely to create the appearance of a conflict of interest.

(d) Scoring by raters shall be done as follows:

(1) For the part I-interview portion of the test, the applicant shall be rated by both deaf and hard of hearing raters and raters who can hear; and

(2) For the part II- performance portion of the test, the raters who can hear shall score primarily the ASL-to-English components of the evaluation and the deaf or hard of hearing raters shall score primarily the English-to-ASL components of the evaluation.

(e) Raters shall receive the rater stipend from the interpreter classification fund for scoring each applicant. To receive payment, raters shall submit an invoice, which shall include the rater's name, address, name of applicant, and date of rating.

(f) All documents, paperwork and digital media (CD), shall be sent back to the coordinator for record keeping. This process shall ensure confidentiality of the applicant. A breach in this process could create the need for a review and recommendation of the situation and possible removal as a rater by the director.

Ed 104720.13 Publication of Directory of Interpreters for the Deaf. The name and date of award of each individual classified under the classification system program shall be published by the department of education in a directory of interpreters for the deaf, which shall be printed at least biennially. The directory shall also include name, source of national certification, state of NH licensure status, and date of certification for any interpreter certified by the RID or the NAD who wishes to be included in the directory. Contact information shall be included at the option of the interpreter. The primary source for this document shall be located on the designated state unit ~~the designated state unit~~ **NHVR**'s website and an annual printing will occur.

Ed 104720.14 Retention of Test and Directory Data. The program for the deaf and hard of hearing shall keep the following data in confidential files for a period of at least 7 years:

(a) Correspondence with individual applicants;

(b) Records of scores of individual tests for each applicant tested, whether the applicant was successful or unsuccessful;

(c) Records of CEU's for each interpreter who has completed the state classification process;

(d) The original digital media (CD) of each applicant's interview and performance test;

(e) The date classification under Ed 102317.10 was awarded; and

(f) Name, address, and telephone number for each state classified and nationally certified interpreter listed in the department of education directory of interpreters for the deaf.

Ed 104720.15 Appeal. An applicant aggrieved by a decision of the program relating to classification may file a petition for reconsideration along with supporting documentation to the Director within 20 working days after receipt of the decision regarding classification. If the petition for reconsideration is denied, the applicant may appeal the Director's decision pursuant to RSA 21-N: 11, III and Ed 200. Any person may file a written complaint charging a person qualified as a deaf interpreter with misconduct pursuant to the process set forth in INT 205.

PART Ed 104821 REVIEW, *MEDIATION, AND HEARINGS* PROCEDURES

Ed 104821.01 Review Procedures.

(a) Review procedures shall comply with 34 CFR 361.57 and New Hampshire law.

(b) An individual who is dissatisfied with any determination made by personnel of ~~the designated state unit~~ **NHVR** that affects the provision of vocational rehabilitation services may request, or, if appropriate, may request through the individual's representative, a timely review of that determination.

(c) ~~The designated state unit~~ **NHVR** shall make reasonable accommodation for the individual's disability in conducting hearings and mediation procedures. Reasonable accommodation shall include using appropriate modes of communication consistent with the informed choice of the individual.

Ed 104821.02 Notification of Right to Mediation and Hearings.

(a) ~~The designated state unit~~ **NHVR** shall provide an individual or, as appropriate, the individual's representative, notice of:

(1) The right to obtain review of ~~designated state unit~~ **NHVR's** determinations that affect the provision of vocational rehabilitation services through a hearing under Ed 1018.07 and Ed 1018.15;

(2) The availability of informal dispute resolution under Ed 1018.03

(3) The right to pursue mediation under Ed 1018.05 with respect to determinations made by ~~designated state unit~~ **NHVR** personnel that affect the provision of vocational rehabilitation services to an individual;

(4) The names and addresses of department of education personnel with whom requests for mediation or hearings may be filed;

(5) The manner in which a neutral mediator or hearing officer is selected; and

(6) The availability of the client assistance program, established under 34 CFR 370, to assist the individual during neutral evaluation, mediation sessions or hearings.

(b) The notice required in Ed 1018.04(a) shall be provided by using the appropriate mode of communication consistent with the informed choice of the individual:

(1) At the time the individual applies for vocational rehabilitation services;

(2) At the time the individual is assigned to a category in the order of selection, if an order of selection is established under Ed 1006;

(3) At the time the individualized plan for employment is developed; and

(4) Whenever vocational rehabilitation services for an individual are reduced, suspended, or terminated;

(c) Determinations for which a review may be requested include ~~the designated state unit~~ **NHVR**'s failure to release harmful information directly to the individual.

Ed 1048**21**.03 Informal Dispute Resolution.

(a) An individual, or a representative of the individual, seeking review of a determination shall file a complaint with the administrator for policy and law at the bureau of vocational rehabilitation, in ~~the designated state unit~~ **NHVR**.

(b) Filing a complaint shall not prevent the individual from requesting mediation or a due process hearing in the case where the complaint is not resolved to the individual's satisfaction.

Ed 1048**21**.04 Mediation.

(a) Mediation shall be voluntary and available to individuals in accordance with 34 CFR 361.57(d), and Ed 205.

(b) If mediation as described in Ed 205.03 is selected by the parties and resolution is not achieved, the individual selected as a mediator shall not be the same individual who is subsequently appointed as a hearing officer to preside at a hearing in the same matter pursuant to Ed 1018.10(c).

(c) Inconsistencies between mediation procedures in Ed 205.03 and Ed 1018.05 shall be resolved in favor of the provisions of Ed 1018.05.

Ed 1048**21**.05 Mediation Procedure.

(a) An individual shall have the option of using mediation to resolve disputes involving ~~designated state unit~~ **NHVR** determinations that affect the provision of vocational rehabilitation services. Mediation shall be made available, at a minimum, whenever an individual or, as appropriate, the individual's representative requests a hearing. Mediation may also be requested without filing a complaint or requesting a hearing.

(b) Mediation shall not be used to deny or delay the individual's right to pursue resolution of the dispute through a hearing held within the 60 day time period for holding hearings required by 34 CFR 361.57(e). At any point during the mediation process either the individual or the mediator shall have the option of electing to terminate the mediation. In the event mediation is terminated, the individual shall have the option of pursuing resolution through a hearing.

(c) An individual may be represented during mediation sessions by counsel or another advocate selected and paid for by the applicant or individual.

(d) Mediation sessions shall be conducted by a qualified and impartial mediator. The mediator shall be chosen at random from a pool of mediators who are knowledgeable about vocational rehabilitation services.

(e) Mediation sessions shall be arranged by the office of legislation and hearings in the designated state agency. Mediation shall be scheduled within 30 days from the date a written request for mediation is received by ~~the designated state unit~~ **NHVR**.

(f) Discussions that occur during the mediation sessions shall be kept confidential and shall not be used as evidence in any subsequent hearings or civil proceedings. The parties to the mediation sessions shall sign a confidentiality pledge prior to the commencement of the sessions.

(g) An agreement reached by the parties to the dispute in the mediation sessions shall be described in a written mediation agreement that is developed by the parties with the assistance of the qualified and impartial mediator and signed by both parties. Copies of the agreement shall be sent to both parties.

(h) The costs of the mediation process shall be paid by ~~the designated state unit~~ **NHVR**.

Ed 1018.06 Scheduling of Mediation, Prehearing Conference, and Hearing.

(a) At the time of the filing of a request to initiate a hearing under Ed 1021.07, the parties shall notify the office of legislation and hearings in the designated state agency of whether they wish to pursue mediation prior to a prehearing conference and a hearing.

(b) If the parties choose not to engage in mediation the office of legislation and hearings in the department of education shall schedule the prehearing conference and hearing based on hearing officer availability, as provided in Ed 1018.10.

(c) The scheduling shall allow for the following:

- (1) A day for an alternative dispute resolution, if the parties so decide;
- (2) A half day for a prehearing conference; and
- (3) A minimum of 2 days for a hearing.

Ed 1048.21.07 Initiation of Hearing by Applicant or Individual.

(a) An individual who is dissatisfied with any determination made by personnel of ~~the designated state unit~~ **NHVR** that affects the provision of vocational rehabilitation services shall notify the office of legislation and hearings in the designated state agency, in writing, if he or she wishes to request a due process hearing. The written request for a hearing shall be made within 30 days after ~~the designated state unit~~ **NHVR** notifies the individual of its determination or completion of an alternative dispute resolution procedure.

(b) The written request required to initiate the hearing process shall include:

- (1) The full name and address of the individual;
- (2) A description of why the individual is not satisfied with the determination; and
- (3) The desired outcome of the complaint or mediation procedure, if applicable.

(c) When providing a written request for a hearing is a burden to the individual because of the individual's disability, the office of legislation and hearings shall accept a request in the appropriate mode

of communication that is consistent with the informed choice of, and used by, the individual in order to promote the fair, accurate, and efficient resolution of issues.

Ed 1048~~21~~.08 Commencement of Hearing Process. The hearing shall be held no later than 60 days after the office of legislation and hearings receives a request for the hearing under Ed 1018.07, unless an agreement is reached prior to the 60th day, or unless the parties agree to a specific extension of time.

Ed 1048~~21~~.09 Denial, Dismissal, or Withdrawal of Request for Hearing.

(a) The office of legislation and hearings in the department of education shall not deny or dismiss a request for a hearing unless the individual:

- (1) Withdraws the request in writing;
- (2) Is held by the hearing officer to be in default for failure to appear at the hearing without good cause that constitutes illness, accident, or any other circumstances beyond the control of the individual; or
- (3) The hearing officer grants a motion to dismiss.

(b) An individual may withdraw a request for a hearing without prejudice until such time as he or she retains legal counsel.

(c) When withdrawing a request for a hearing in writing is a burden to the individual because of the individual's disability, the office of legislation and hearings shall accept requests in the appropriate mode of communication that are consistent with the informed choice of, and used by, the individual in order to promote the fair, accurate, and efficient resolution of issues.

Ed 1048~~21~~.10 Scheduling Mediation Proceedings and Hearings.

(a) The office of legislation and hearings in the department of education shall schedule mediation, if requested, and a prehearing conference and a hearing as follows:

(b) As soon as the mediation, if any, the prehearing conference, and the hearing have been scheduled, the office of legislation and hearings shall notify the parties in writing of:

- (1) The date, time and place of the requested mediation and the prehearing conference;
- (2) The date, time, place, and nature of the hearing;
- (3) Legal authority under which the hearing is to be held;
- (4) The particular sections of the statutes and rules involved, including a copy of Ed 100418;
- (5) A short and plain statement of the issues involved; and
- (6) The party's right to have an attorney present to represent the party at the party's expense.

(c) The name and address of the hearing officer who will preside at a hearing shall be selected:

- (1) From a list of hearing officers, who have knowledge of state and federal vocational rehabilitation law, that is maintained by the office; and

(2) On a random basis.

Ed 104821.11 Elements of a Hearing. A hearing shall include the following elements:

- (a) A prehearing conference, governed by Ed 1018.13;
- (b) A hearing, governed by Ed 1018.15, that shall, except for good cause shown, be limited to 2 days; and
- (c) A hearing officer's decision under Ed 1018.16(a) shall be considered the final decision of ~~the designated state unit~~ **NHVR**.

Ed 104821.12 Prehearing Procedures. The prehearing conference required by Ed 1018.10(a) shall be conducted by a hearing officer and governed by the following:

- (a) Parties shall be prepared to discuss the issues described in RSA 541-A:31,V(c);
- (b) Parties shall exchange, and provide to the hearing officer, witness lists including a brief description of each witness's testimony, and documentary evidence at least 5 business days before the hearing. Documentary evidence exchanged shall be legibly labeled in the upper right-hand corner with consecutive Arabic numerals as either "Individual Exhibit (number)" or "~~designated state unit~~ **NHVR**(number)", as appropriate. An index, by title, of all exhibits submitted shall also be exchanged;
- (c) In order to limit testimony at the hearing to only those factual matters which remain in dispute between the parties, each party shall submit a statement of facts;
- (d) The party who has initiated the hearing shall present his or her case first unless the hearing officer determines that the change in the order of presentation would not materially prejudice any party's right to a full and fair hearing and:

- (1) The hearing would proceed in a more timely manner if the party not initiating the hearing presents his or her case first; or
- (2) The hearing would proceed in a more efficient manner if the party not initiating the hearing presents his or her case first.

Ed 104821.13 Voluntary Production of Information.

- (a) Each party shall attempt in good faith to make a complete response to requests, as soon as practicable, for the voluntary production of information.
- (b) When a dispute between parties arises concerning a request for the voluntary production of information, releases, or documents, any party may file a motion to compel the production of the requested information under Ed 1018.14.

Ed 104821.14 Motion to Compel Production of Information.

- (a) Any party may file a motion requesting that the hearing officer compel the parties to comply with information requests. The motion shall be filed at least 15 days before the date scheduled for the hearing, or as soon as possible after receiving the notice of hearing. Any objection to the motion to compel shall be filed within 5 days of the date receipt of the motion.

(b) The moving party's motion shall:

- (1) Set forth in detail those factors which it believes justify its request for information; and
- (2) List with specificity the information it is seeking to discover.

(c) When a party has demonstrated that such requests for information are relevant to the issues described in the hearing notice and might be necessary for a full and fair presentation of the evidence at the hearing because they have the potential to affect the outcome of the hearing, the hearing officer shall grant the motion to compel.

Ed 104821.15 Hearing Procedures. The hearing shall be conducted by a hearing officer, governed by the following:

(a) All hearings shall be electronically recorded by the hearing officer or his or her designee. The hearing officer's recording shall be the official record of the hearing unless a party requests and pays for stenographic recording of such hearing. If a party requests and pays for a stenographic recording of the hearing, the stenographic record shall be under the control of the hearing officer and shall be the official record;

(b) Any party to a hearing shall have the right to:

- (1) Be accompanied and advised by counsel, who shall be an attorney, or by an individual with special knowledge or training with respect to vocational rehabilitation services and whose services shall be paid for by the party retaining counsel;
- (2) Present evidence and confront and cross-examine witnesses;
- (3) Request that the hearing officer prohibit the introduction of any evidence at the hearing that has not been disclosed to that party at least 5 business days before the first day of the scheduled hearing;
- (4) Obtain a verbatim record of the hearing, at any point during the hearing or afterwards;
- (5) Obtain written findings of facts and decisions; and
- (6) Record the hearing;

(c) At the conclusion of the hearing an applicant, eligible individual, or previously eligible individual may request, at no cost, a verbatim record of the hearing in either electronic or written format and written findings of fact and decisions at no cost for the first copy of each item. Any additional copies or copies of any of the items in the case file shall be available at the department's cost to produce them;

(d) An applicant, eligible individual, or previously eligible individual shall have the right to open the hearing to the public. However, if a hearing is open to the public, the hearing officer shall seat the members of the public and position their equipment in such a way that the public and equipment do not interfere with the proceedings;

(e) Each party shall have a maximum of one day to present its case, unless additional time is necessary for a full, fair disclosure of the facts necessary to arrive at a conclusion;

(f) The hearing officer shall limit the number of additional witnesses to eliminate redundant, cumulative, or irrelevant testimony; and

(g) The hearing officer shall limit examination of a witness by either party to avoid redundant, cumulative, or irrelevant testimony.

Ed 104821.16 Agreement Prior to Hearing.

(a) If the parties reach an agreement prior to the hearing, both parties shall sign a written statement requesting the cancellation of the hearing.

(b) When signing a written statement requesting the cancellation of the hearing is a burden to the applicant, eligible individual, or previously eligible individual because of the individual's disability, the office of legislation and hearings shall accept such requests in the appropriate mode of communication that is consistent with the informed choice of and used by the applicant, eligible individual, or previously eligible individual in order to promote the fair, accurate, and efficient resolution of issues.

Ed 104821.17 Continuance of Hearing.

(a) A hearing officer shall grant extensions of time beyond the period set out in Ed 1018.15(e) for specific periods of time at the request of either party if:

(1) The party's vocational rehabilitation services would not be jeopardized by the delay;

(2) The party would not have adequate time to prepare and present the party's position at the hearing in accordance with the requirements of due process; and

(3) The need for the delay is greater than any financial or other detrimental consequences likely to be suffered by a party in the event of delay.

(b) A hearing shall not be continued by the hearing officer because of the hearing officer's schedule.

Ed 104821.18 Decision.

(a) The hearing officer shall issue a final decision not later than 30 days after the hearing is completed. The final decision shall be consistent with RSA 541-A:35. The final decision shall be based on the provisions of the approved state plan, the Act, federal vocational rehabilitation regulations, and state rules that are consistent with federal requirements.

(b) The hearing officer shall provide to the individual or, if appropriate, to the individual's representative, and to ~~the designated state unit~~ **NHVR** a full written report of the findings and grounds for the final decision within 30 days after the hearing is completed.

(c) A copy of the final decision shall be sent by certified mail to each of the parties.

Ed 104821.19 Impact on Provision of Services During Proceedings.

(a) ~~The designated state unit~~ **NHVR** shall not institute a suspension, reduction, or termination of vocational rehabilitation services being provided to an applicant or eligible individual, including evaluation and assessment services and individualized plan for employment development, pending resolution of a request for review of a determination through mediation or pending a decision by a hearing officer unless:

- (1) The individual or, in appropriate cases, the individual's representative requests a suspension, reduction, or termination of services;
- (2) ~~The designated state unit~~ **NHVR** has evidence that the services have been obtained through misrepresentation, fraud, collusion, or criminal conduct on the part of the individual or the individual's representative; or
- (3) The individual or the individual's representative engages in delaying tactics to avoid a determination of the issue for the purpose of continuing services ~~the designated state unit~~ **NHVR** believes are inappropriate or inconsistent with the program or the employment aptitudes and interests of the individual. In the case of apparent delaying tactics, the following shall apply:
- a. Any case that remains open after 180 days shall be presumed to be a case where delay tactics are being employed; and
 - b. In any case open longer than 180 or whenever the hearing officer believes a party is hindering the prosecution of the case, the hearing officer shall require the offending party to show good cause pursuant to Ed 206.04(a) why the hearing officer should not dismiss the case with prejudice.
- (b) If a party brings a civil action under Ed 1018.20 to challenge the final decision of the hearing officer made under Ed 1018.18(f), the final decision of the hearing officer shall be implemented pending review by the court.
- Ed 1048.21 Civil Action. Any party who disagrees with the findings and decision of the hearing officer may bring a civil action to appeal that decision in a state or a United States district court of competent jurisdiction as provided in 34 CFR 361.57(i).

Appendix I

Rule	Statute or Federal Regulation Implemented
Ed 1001	34 CFR 361; RSA 200-C:1
Ed 1002	34 CFR 361.5
Ed 1003	34 CFR 361.38
Ed 1004	34 CFR 361.41
Ed 1005	34 CFR 361.42
Ed 1006	34 CFR 361.42-44
Ed 1007	34 CFR 361.42
Ed 1008	34 CFR 361.45-46
Ed 1009	34 CFR 361.36
Ed 1010	34 CFR 361.53
Ed 1011	34 CFR 361.54
Ed 1012	34 CFR 361.51
Ed 1013	34 CFR 361.52
Ed 1014	34 CFR 361.55
Ed 1015	34 CFR 361.56
Ed 1016	34 CFR 363
Ed 1017	45 CFR 1329; 34 CFR 77.1
Ed 1018	34 CFR 367

Ed 1019	34 CFR 395
Ed 1020	RSA 326-I:5, RSA 200-C:19, IV
Ed 1021	RSA 541-A:30-a; 34 CFR 361.57



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EXECUTIVE SUMMARY

**Adopt: Ed 501-Ed 504, Ed 505, Ed 506 and Ed 508, and Ed 509 and Ed 512
and Ed 513 – NH Educator Licensing
Expires: Various dates, none expiring**

Submitted to the State Board of Education, September 10, 2020:

A. ACTION NEEDED

A vote is needed by the State Board of Education to adopt Ed 501-Ed 504, Ed 505, Ed 506 and Ed 508, and Ed 509 and Ed 512 and Ed 513, NH Educator Licensing Rules.

B. RATIONALE FOR ACTION

The Board approved a conditional approval response for these rules on August 13, 2020 and the rules are now ready for adoption.

C. EFFECTS OF THIS ACTION

If the board votes to adopt these rules, the department will submit the rules to the Office of Legislative Services (OLS) for an effective date of October 5, 2020.

D. POSSIBLE MOTION

I move that the State Board of Education adopt Ed 501-Ed 504, Ed 505, Ed 506 and Ed 508, and Ed 509 and Ed 512 and Ed 513, NH Educator Licensing Rules.

PART Ed 505 HOW TO OBTAIN A NEW HAMPSHIRE EDUCATOR LICENSE

Readopt with amendment Ed 514.01, effective 8-9-18 (Document #12602), and renumber as Ed 505.01 to read as follows:

Ed 505.01 Basic Academic Skills and Subject Area Assessment.

(a) Except as described in paragraph (h), each candidate seeking an initial teacher or instructional specialist license under one of the pathways listed below shall pass a basic academic skills assessment, including, but not limited to, the praxis core academic skills for educators administered by Educational Testing Service (ETS) or comparable out of state test as determined by the bureau.

(b) Each candidate seeking licensure in any endorsement area for which the board has adopted a subject assessment test cut score shall pass that subject assessment test, or comparable out of state test as determined by the bureau, to measure the test taker's knowledge of the specific subject area of a concentration in which the test taker seeks an educator license.

(c) The board shall either:

(1) Adopt the national cut scores for the praxis core academic skills for educators and all subject assessments in accordance with (a) and (b); or

(2) Request that the department conduct a validation study for any subject assessment for reasons including, but not limited to:

a. There is no established national cut score for a given subject area; and

b. To determine, through stakeholder engagement, that the national score accurately reflects NH goals.

(d) Validation studies shall include input from:

(1) The department;

(2) Teacher education institutions; and

(3) New Hampshire teachers with experience as an educator in the test areas.

(e) The entities described in (d)(1)-(3) above shall provide input and recommendations regarding:

(1) Test specifications appropriate for New Hampshire;

(2) Which assessments are appropriate for New Hampshire; and

(3) Passing scores on tests for New Hampshire.

(f) The board shall accept, in lieu of (a) above, performance at or above the 50th percentile on a nationally-recognized basic academic skills test in the areas of reading, writing, and mathematics, including, but not limited to:

(1) The Scholastic Aptitude Test (SAT) administered by the College Board;

(2) The Graduate Record Examinations (GRE) administered by ETS; and

(3) The ACT administered by ACT.

(g) A candidate for a career and technical education (CTE) specialty area license may substitute the following in lieu of a nationally recognized test of academic proficiency required by (a):

(1) Three years of full-time experience in the area for which the license is sought; and

(2) Current industry-recognized credential approved by the department in a published list of accepted credentials appropriate to the CTE area in which a license is sought.

(h) Candidates shall be responsible for the actual cost of all assessments.

(j) A candidate may take a basic academic skills assessment or the subject area assessment as often as they are administered until the candidate passes the assessment.

Readopt with amendment and renumber Ed 505.06 and Ed 505.07, effective 12-17-11 (Document #10046), as Ed 505.02 and Ed 505.03 to read as follows:

Ed 505.02 General Education Requirements. Each applicant who seeks licensure under Ed 505.05 shall have completed a program providing the following core competencies:

(a) Content competencies in the following areas necessary for college and workforce success:

(1) Language arts;

(2) Reasoning;

(3) Information literacy;

(4) Mathematics;

(5) Sciences; and

(6) Social sciences;

(b) Creative competencies in the following areas:

(1) Creative expression;

(2) Critical thinking;

(3) Innovative and collaborative problem-solving; and

(4) Resourcefulness;

(c) Communication competencies in the following areas:

(1) Languages;

- (2) Digital media;
- (3) Networking; and
- (4) Content creation technologies; and
- (d) Cultural competencies in the following areas:
 - (1) Cultural understanding;
 - (2) Taking responsibility for self and others;
 - (3) Adaptability and resilience;
 - (4) Ability to engage in productive teamwork; and
 - (5) Social and civic engagement.

Ed 505.03 Professional Education Requirements. In addition to the requirements in Ed 505.05 for site-based licensing plans and Ed 505.06 for demonstrated competencies each applicant who is not already licensed shall demonstrate evidence of the following before licensure is granted:

- (a) In the area of the learner and learning:
 - (1) Learner development, as demonstrated by:
 - a. An understanding of how learners develop, recognizing that patterns of learning and development vary individually within and across the personal, physical, social, and academic dimensions; and
 - b. The ability to facilitate developmentally appropriate and challenging learning experiences based on the unique needs of each learner;
 - (2) Learning differences, as demonstrated by:
 - a. An understanding of individual differences and diverse cultures and communities;
 - b. Ensuring inclusive learning environments that allow each learner to reach his or her full potential; and
 - c. The ability to employ universal design principles and assistive technology; and
 - (3) Learning environment, as demonstrated by:
 - a. Working with learners to create and access learning environments that support self-directed individual and collaborative learning, based on each learner's interests and passions; and
 - b. Use of learning environments not limited to the classroom, but extended into the larger community as well as virtual experiences;

(b) In the area of content:

(1) Content knowledge, as demonstrated by:

- a. An understanding of the central concepts, tools of inquiry, and structure of his or her discipline(s); and
- b. An ability to create learning experiences that make the discipline(s) accessible and meaningful for learners; and

(2) Innovative applications of content, as demonstrated by an understanding of how to connect concepts and use differing perspectives to engage learners in critical and creative thinking and collaborative problem-solving related to authentic local and global issues;

(c) In the area of learning facilitation practice:

(1) Use of assessment, as demonstrated by an understanding and ability to use multiple methods of assessment to:

- a. Engage learners in their own growth;
- b. Document learner progress;
- c. Provide learner feedback; and
- d. Inform the educator's ongoing planning and instructional practices;

(2) Planning for learning facilitation, as demonstrated by an ability, as an active member of a learning community, to draw upon knowledge of content area standards, cross-disciplinary skills, learners, the community, and pedagogy to plan learning experiences that support every learner in meeting rigorous learning goals; and

(3) Learning facilitation strategies, as demonstrated by:

- a. An understanding and use of a variety of strategies and tools to encourage learners to develop deep understanding of content areas and their connections to other disciplines; and
- b. An ability to build skills in accessing, applying, and communicating information; and

(d) In the area of professional responsibility:

(1) Reflection and continuous growth, as demonstrated by:

- a. Being a reflective practitioner and using evidence to continually evaluate his or her practice, particularly the effects of choices and actions on students, families, and other professionals in the learning community; and
- b. Ability to adapt practice to meet the needs of each learner; and

- (2) Collaboration, as demonstrated by collaborating, as a member of the larger learning community, with learners, families, colleagues, other professionals, and community members to leverage resources that contribute to student growth and development, learning, and well-being.

Readopt with amendment Ed 505.01 and Ed 505.02, effective 10-11-19 (Document #12897, Interim), and renumber as Ed 505.04 to read as follows:

Ed 505.04 Approved Educator Preparation Program.

(a) Individuals shall qualify for a beginning educator license or added endorsement to an existing license by completing a ~~state~~ board-approved educator preparation program(s) at a college, university or teacher training institution in New Hampshire in accordance with Ed 600 and meeting the requirements of Ed 505.01.

(b) Upon completion of a New Hampshire board-approved program in accordance with Ed 600, the applicant shall be recommended for licensure by the program to the department and such recommendation shall remain valid for no more than 3 years from the date of the recommendation by the institution.

(c) Individuals completing a state-approved educator preparation program(s) at a college, university, or teacher training institution in a state other than New Hampshire, whether that state is signatory to the NASDTEC interstate contract or not, shall qualify for a beginning educator license or added endorsement on an existing license by:

- (1) Completing a state-approved educator preparation program leading to recommendation by the institution for an educator license in that state; and

- (2) Meeting the requirements of Ed 505.01; and either:

- a. Obtaining full licensure in that state in a comparable endorsement area as the endorsement area sought providing that such endorsement has not been expired for more than 3 years from the date of application; or

- b. Applying for a comparable New Hampshire state board license and endorsement within 3 years of the date of recommendation from the institution.

(d) Applicants seeking to obtain licensure under this paragraph shall apply to the department pursuant to Ed 505.07 through Ed 505.09.

Readopt with amendment Ed 505.04 and Ed 505.05, effective 9-16-11 (Document #9992), and renumber as Ed 505.05, to read as follows:

Ed 505.05 Statement of Eligibility (SOE) and Site-Based Licensing Plan (SBLP).

(a) Before beginning an application for a SBLP, a candidate shall obtain a statement of eligibility (SOE), valid for 3 years from the date of issuance, from the department as follows:

- (1) Meeting the entry requirements as follows:

a. Meeting the degree requirement and experience requirement of the endorsement sought as outlined in Ed 506 through Ed 508; and

b. Either:

1. Passing the subject area assessment for endorsements for which the board has adopted a cut score in accordance with Ed 505.01(b); or

2. Only if a subject area test does not exist, transcript analysis to determine a passing grade for 3 full semester, full college-level courses, comparable to 3 credit courses, which directly translate to required competencies in the endorsement area sought as enumerated in Ed 506 through Ed 508;

(2) Meeting the requirements of Ed 505.01(a) or (g); and

(3) Applying for a statement of eligibility following the application procedures outlined in Ed 505.07 through Ed 505.09.

(b) A SBLP shall be a qualifying method for licensure limited to the following:

(1) Applicants for an endorsement determined by the department to be a critical staffing shortage, published on the department's website, who hold at least a bachelor's degree, or who hold an associate's degree for educational interpreter/transliterators for children and youth ages 3-21;

(2) Applicants for an endorsement in the career and technical specialties pursuant to Ed 507.03;

(3) Applicants for any endorsement for which there is no other available pathway to the license who hold at least a bachelor's degree, or who hold an associate's degree for educational interpreter/transliterators for children and youth ages 3-21;

(4) Applicants for a new endorsement for a period of 5 years from the effective date of a new endorsement rule and who hold at least a bachelor's degree;

(5) Applicants for a business administrator endorsement who have successfully completed at least 4 college-level courses in the endorsement for which they seek a license;

(6) Applicants for a teaching endorsement who have successfully completed at least 10 college-level courses in the endorsement area for which they seek a license;

(7) Applicants for elementary K-6 education and early childhood education who have successfully completed at least 2 college-level content courses each in mathematics, English, social studies, and science; and

(8) Applicants for elementary K-8 education who have successfully completed at least 2 college-level content courses each in mathematics, English, social studies, and science and at least 3 additional college-level content courses for a concentration of coursework in one of those areas.

(c) SOE credential holders shall be employed in a New Hampshire school in the role of the endorsement that allows them to learn and demonstrate the professional education standards enumerated in Ed 505.03, if applicable, and the endorsement requirements enumerated in Ed 506 through Ed 508.

(d) Upon employment as an educator, the applicant and the senior educational official shall adhere to the application procedures and timeline outlined in Ed 505.07, Ed 505.08, and Ed 505.09(f).

(e) Upon employment as an educator under a statement of eligibility, each candidate for this pathway to licensure shall be assigned a mentor, appointed by the senior educational official, who holds a valid experienced educator license with appropriate endorsements in the same subject area in which the candidate is seeking to obtain a license. If a mentor who meets that criteria is not available through the candidate's employer, the senior educational official shall contact the bureau for assistance in obtaining an appropriate mentor.

Readopt with amendment and renumber Ed 505.03, effective 10-11-19 (Document #12897, Interim), as Ed 505.06 to read as follows:

Ed 505.06 Demonstrated Competencies.

(a) In addition to the requirements in Ed 505.06(e), applicants for demonstrated competencies through portfolio and oral board reviews shall qualify for a beginning educator license or added endorsement on an existing license by documenting at least 4 months of continuous full-time or full-time equivalent experience as an educator in the endorsement area;

(b) In addition to the requirements in Ed 505.06(e), applicants for demonstrated competencies through national or regional licensure shall qualify for a beginning educator license or added endorsement on an existing license by meeting one of the following requirements:

(1) Current national board certification in the area of endorsement from the National Board for Professional Teaching Standards;

(2) A current national license in school psychology (NCSP) by the National Association of School Psychologists for an endorsement in school psychology; or

(3) A current US Department of Defense educator license;

(c) In addition to the requirements in Ed 505.06(e), applicants for an administrator endorsement, as defined in Ed 501.02(a), through demonstrated competencies through transcript analysis shall qualify for a beginning educator license or added endorsement on an existing license by meeting endorsement-specific knowledge and skills competencies as determined by transcript analysis; ~~or.~~

(d) In addition to the requirements in Ed 505.06(e), applicants for demonstrated competencies based on experience under an out-of-state endorsement on a full license shall qualify for a beginning educator license or added endorsement on an existing license by:

(1) Having held a comparable license from a state other than New Hampshire within the last 7 years, verified by the department; and

(2) Having 3 years of educator experience in the last 7 years working in the endorsement area being sought while licensed in that endorsement area, verified by the department.

(e) In addition to the requirements of the chosen pathway in (a) through (d) above, every applicant for a demonstrated competency pathway shall meet all of the following requirements:

- (1) Holding the minimum degree required for the endorsement sought;
- (2) Meeting any endorsement-specific requirements outlined in Ed 506 through Ed 508;
- (3) Meeting the requirements of Ed 505.01 through Ed 505.03, as applicable; and
- (4) Applying for a demonstrated competency pathway pursuant to the application procedures outlined in Ed 505.07 through Ed 505.09.

Readopt with amendment and renumber Ed 508.01, effective 6-15-13 (Document #10362), as Ed 505.07 to read as follows:

Ed 505.07 General Application Instructions.

(a) Persons interested in holding a New Hampshire educator credential shall complete and file an application with the bureau either online or by mail as follows:

- (1) On the myNHDOE Educator Information System (EIS); or
- (2) Bureau of Credentialing
Department of Education
101 Pleasant Street
Concord, NH 03301.

(b) Applicants for any credential shall complete and file the appropriate form as follows:

- (1) “Statement of Eligibility” form, January 2020, for applicants seeking an SOE as outlined in Ed 505.05(a);
- (2) “Application for Licensure – Educator Preparation Program Completer” form, January 2020, for all applicants seeking initial licensure or additional endorsements as outlined in Ed 505.04;
- (3) “Recommended for Renewal Application” form, January 2020, for all New Hampshire licensed educators seeking to renew after recommendation as outlined in Ed 509.01;
- (4) “DOE Renewal Application” form, January 2020, for all New Hampshire licensed educators seeking to renew directly to the bureau as outlined in Ed 509.02;
- (5) “Emergency Authorization Request” form, January 2020, for senior educational officials requesting to employ an unlicensed educator as described in Ed 504.04;
- (6) “Application for Emergency Authorization” form, January 2020, for any unlicensed educator employed by a school district for which the employer is seeking an emergency authorization as described in Ed 504.04;

- (7) “In Process of Licensure Authorization” form, January 2020, for any senior educational official who seeks to hire an educator who is in the process of becoming a licensed educator as outlined in Ed 504.05;
 - (8) “Paraeducator License Application” form, January 2020, for any applicant seeking a paraeducator license as outlined in Ed 504.06 and Ed 504.07; and
 - (9) “School Nurse License Application” form, January 2020, for any applicant seeking a school nurse I, II, or III license as outlined in Ed 504.08 through Ed 504.10;
 - (10) “Name Change Request” form, January 2020, for any credential holder seeking a credential issued with an official name change;
 - (11) “Educational Interpreter/Transliterater for Children and Youth ages 3-21” form, January 2020, as outlined in Ed 504.11.
 - (12) “Credential Verification Request” form, January 2020, for any credential holder seeking a verification of their New Hampshire credential;
 - (13) “Application for Licensure - Demonstrated Competencies” form, January 2020, for any applicant seeking licensure as outlined in Ed 505.06(b), Ed 505.06(c), and Ed 505.06(d);
 - (14) “Application for Licensure – Portfolio and Oral Board Review” form, January 2020, for all applicants seeking licensure as outlined in Ed 505.06(a);
 - (15) “Intern Authorization Application – Site-Based Licensing Plan” form, January 2020, for all applicants seeking licensure as outlined in Ed 505.05;
 - (16) “Site-Based Licensing Plan Completer” form, January 2020, for all applicants who have completed their SBLP and are ready for full licensure as outlined in Ed 505.09(f)(17);
- (c) If an applicant provides a social security number on any application form, the social security number shall be used by the bureau for the purposes of generating data on teacher salaries or such other purposes as authorized by law including but not limited to RSA 161-B:11, VI-a.
- (d) If an applicant chooses to have the department supply an alternative number, the department shall use the number generated by the EIS and it shall be used as specified in (c) above.
- (e) For Ed 505.07(b)(15), if an assessment of an applicant’s background determines that some or all of the education requirements have been completed prior to application, the applicant shall not be required to repeat any requirement already completed.
- (f) Filing of the completed application, supporting documentation, and application fee shall be the responsibility of the applicant.
- (g) All applicants for any credential or endorsement issued by the state board shall acknowledge an understanding and adherence to the code of conduct as specified in Ed 510.01 through Ed 510.05 at the time of application.
- (h) If an application receiving a conditional approval does not result in an approval and license, or the requirements outlined are not completed within the timeframe allotted in the conditional approval, the

application shall be closed and the applicant shall begin a new application, to include all fees in accordance with the fee schedule outlined in Ed 505.08.

Repeal Ed 505.08, effective 6-15-19 (Document #12813) as follows:

~~Ed 505.08 Code of Conduct Requirements. All applicants for any credential or endorsement issued by the state board shall acknowledge an understanding and adherence to the code of conduct as specified in Ed 510.01 through Ed 510.05 at the time of application.~~

Readopt with amendment and renumber Ed 508.06, effective 11-14-17 (Document #12418), as Ed 505.08 to read as follows:

Ed 505.08 Fees.

(a) An application shall not be complete until all application materials, including the proper fee, have been filed with the bureau.

(b) Payments shall be made either electronically at the time of application on the department website or by cash, money order or cashier's check, or school employer check on behalf of applicants, made payable to "Treasurer, State of New Hampshire," to the bureau as outlined in Ed 505.07(a).

(c) The required educator fees shall be in accordance with RSA 186:11,X(b), and the fee schedule set forth in Table 505-1 below, with the following fees reflecting the actual cost of the service listed:

Table 505-1 Fee Schedule

*All fees are non-refundable and include processing fee.	
Approved Educator Preparation Program BEL/EEL (per endorsement)	\$120.00
Site Based Licensing Plan	
Statement of Eligibility (per endorsement)	\$50.00
Intern Authorization (per endorsement)	\$120.00
Upgrade to BEL/EEL (per endorsement)	\$120.00
Demonstrated Competencies Portfolio/Oral Board	
Materials (per endorsement)	\$50.00
Portfolio Review/Oral Board (per endorsement)	\$500.00
BEL/EEL (per endorsement)	\$120.00
Demonstrated Competencies National/Regional exam/licensure BEL/EEL (per endorsement)	\$120.00
Demonstrated Competencies Transcript Analysis BEL/EEL (per Administrative endorsement)	\$500.00
Demonstrated Competencies Experience under Out of State License BEL/EEL (per endorsement)	\$120.00
BEL/EEL/Master Teacher License Renewal (3 year cycle)	\$120.00
Master Teacher – National Level (per endorsement)	\$120.00
Master Teacher – NH Level (per endorsement)	\$800.00
Late Renewal Filing Fee (BEL/EEL/Master Teacher only)	\$50.00
Paraeducator I	\$10.00
Paraeducator II	\$10.00
Paraeducator I and II Renewal (3 year cycle)	\$10.00

School Nurse I - 3 years with one time renewal	\$75.00
School Nurse II	\$0.00
School Nurse III	\$75.00
School Nurse I, II, III Renewal (3 year cycle)	\$75.00
Educational Interpreter/Transliterater	\$25.00
Educational Interpreter/Transliterater Renewal (3 year cycle)	\$25.00
Name Change	\$50.00
Credential Verification Letter	\$25.00
Emergency Authorization (per endorsement)	\$120.00
Returned check fee (RSA 6:11-a)	\$15.00 (State Treasurer's fee) \$25.00 (Bureau of Credentialing fee)

Readopt with amendment Ed 508.02 through Ed 508.05, effective 6-15-13 (Document #10362), and renumber as Ed 505.09 to read as follows:

Ed 505.09 Applicant, Employer, and Mentor Responsibilities for Timely Review and Processing by the Department.

(a) Within 30 days of receipt of any application outlined in Ed 505.07(b), the department shall notify the applicant in writing that the application has been received and either:

- (1) The application is complete and pending evaluation; or
- (2) The application is incomplete and enumerate the items that the applicant ~~must~~ shall address in order for the application to be complete.

(b) An applicant shall respond to a notification of an incomplete application by submission of the requirements enumerated in accordance with (a)(2) above within 30 days of receipt of the notification, and the department shall respond within 10 business days in accordance with (a)(1) or (2) above.

(c) If, within 30 days of initial notification of an incomplete application pursuant to (a)(2) above, the department does not receive the enumerated items pursuant to (a)(2) above, the application ~~will~~ shall be closed and the applicant shall ~~be required to~~ begin a new application, to include all fees in accordance with the fee schedule outlined in Ed 505.08.

(d) For applications outlined in Ed 505.07(b)(1)-(1+3), within 60 days of the department's notification of receipt of a complete application in accordance with (a) and (b) above, the department shall send notification of:

- (1) Approval in the form of the digital credential for which the applicant applied;
- (2) Denial in writing that outlines the specific reasons for denial, including, but not limited to:
 - a. A department-confirmed violation of the code of conduct outlined in Ed 510.01 through Ed 510.04; and

b. A determination that the applicant does not meet the requirements for the specified credential; or

(3) Conditional approval which includes:

a. An outlines of the specific areas that the applicant needs to address in order for the bureau to continue a full review of the application;

b. An applicant timeline for completing the conditional approval requirements, not to exceed 120 days; and

c. The following statement pursuant to Ed 505.07(h):“If the conditional approval does not result in an approval and license, or the requirements outlined are not completed within the timeframe allotted, the application will be closed and the applicant shall be required to begin a new application, to include all fees in accordance with the fee schedule outlined in Ed 505.08”.

(e) For applications pursuant to Ed 505.07(b)(14), portfolio and oral board reviews, the following shall apply:

(1) The applications for portfolio and oral board review shall be open between October 1 and March 30 of every school year calendar.

(2) Complete applications for oral board review shall include all of the following:

a. Completed and filed “Application for Licensure – Portfolio and Oral Board Review” form, January 2020;

b. Completed and filed portfolio as outlined in (3)a. below;

c. Payment of all fees in accordance with the fee schedule outlined in Ed 505.08; and

c. Completed oral board review;

(3) Within 10 days of receipt of a completed “Application for Licensure – Portfolio and Oral Board Review” form, January 2020, if the department determines that an individual:

a. Qualifies under this method, the department shall notify the applicant in writing by providing the applicant with portfolio submission instructions and requirements for oral board scheduling which shall include, but not be limited to:

1. Written materials;

2. Videotapes;

3. Audiotapes; and

4. Art portfolio; or

b. Does not qualify under this method, the department shall notify the individual in writing and:

1. Provide the reasons for the determination, including, but not limited to, the qualifying criteria outlined in Ed 505.06(a)(1) and (2), which shall include a written explanation stating why the materials the applicant has submitted are not acceptable; and

2. Recommend another appropriate application method if one is available;

(4) Within 30 days of receipt of portfolio submission instructions, the applicant shall submit all portfolio materials for review by the department along with the appropriate fee in accordance with the fee schedule outlined in Ed 505.08;

(5) Within 10 days of receipt of a portfolio submission and appropriate fee in accordance with the fee schedule outlined in Ed 505.08, the department shall notify the applicant in writing that either:

- a. The portfolio is complete and pending oral board scheduling; or

- b. The portfolio is incomplete and enumerate the items that the portfolio must address in order for the portfolio to be complete;

(46) An applicant shall adhere to Ed 505.09(b) and (c) for completing a portfolio submission in accordance with Ed 505.09(e)(5)b. above;

(7) Upon determination by the department that the portfolio is complete, the department shall appoint a review board consisting of one member of the department and 3 persons who hold a current experienced educator license in the area of endorsement in which the applicant is seeking to obtain a license;

(8) If, within 30 days of determination of a complete portfolio, in an effort to complete a timely oral board review, the department is unable to establish a review board as outlined in (6) above, the department shall establish a review board consisting of department staff or licensed educators-;

(9) The review board shall review the applicant's application, including documentation that the applicant meets the required competencies in the area of endorsement and, at the oral board review, ask the applicant questions based upon the materials submitted;

(10) Within 30 days of completion of the oral board review, which shall constitute a complete application, the review board shall make a written recommendation to the department, based upon its evaluation of the quality of the applicant's documentation of meeting the required competencies in the area of endorsement, after considering:

- a. The materials submitted to provide the documentation; and

- b. The applicant's oral responses to the board's questions regarding the documentation;

(11) Within 30 days of the conclusion and recommendation of the oral board interview, the department shall issue a decision in writing stating the reasons for the decision under (7) above along with, if applicable, a beginning educator license or additional endorsement; and

(12) An applicant may appeal a decision made by the department to deny an application for a credential under this part pursuant to Ed 200.

(f) For applications pursuant to Ed 505.07(b)(15), the process for establishing a SBLP for an intern authorization credential resulting in full beginning educator licensure or additional endorsement shall be as follows:

(1) The SOE credential holder and assigned mentor pursuant to Ed 505.05(d) shall download and complete the required SBLP application materials as follows:

- a. “Competency Assessment Sheet”(s) by indicating whether each of the competencies listed, which match the competencies required in Ed 505.03 and Ed 506 through Ed 508, as applicable, have been met, and, if so, how each competency was acquired;
- b. “Site-Based Licensing Plan” form, revised May 2020; and
- c. “Site-Based Licensing Plan Beginning Plan” signature form, revised May 2020;

(2) The SBLP application materials shall be developed collaboratively and agreed to by the SOE credential holder, the mentor, and the senior educational official;

(3) Within 60 days of the SOE credential holder’s first day of employment in the pursuant to Ed 505.05(c), the senior educational official shall upload the completed, approved, and signed SBLP into the department’s EIS;

(4) Within 180 days of the first day of employment pursuant to Ed 505.05(c), the SOE credential holder shall be credentialed under an intern authorization following the procedures outlined in (5) through (23) below;

(5) Within 5 business days of the upload specified in (3) above, the candidate shall complete and file an “Intern Authorization Application – Site-Based Licensing Plan” form, January 2020, along with the appropriate fee pursuant to Ed 505.08;

(6) The department shall review the plan to ensure all of the following are included:

- a. An assessment of the competencies of the applicant as enumerated in Ed 505.03, if applicable, and the endorsement area enumerated in Ed 506, Ed 507, or Ed 508 as applicable, based on the endorsement sought;
- b. A plan that includes the competency to be acquired, the projected completion date, and the evidence to be provided upon completion which is directly related to, and substantiates meeting, the competency within the period of the plan;
- c. Activities that will be undertaken to acquire the competencies in b. above, which shall include, but not be limited to:

1. Additional coursework;
2. On the job training; and
3. Professional development; and

d. A signature page which certifies that the plan was developed collaboratively and agreed to by the applicant, the mentor, and the senior educational official;

(7) Within 30 days of receipt of an “Intern Authorization Application – Site-Based Licensing Plan” form, January 2020, the department shall notify the applicant that either:

- a. The plan is complete and pending evaluation; or
- b. The plan is incomplete and enumerate the items that the applicant must address in order for the application to be complete;

(8) An applicant shall respond to a notification of an incomplete application by submission of the requirements enumerated in accordance with (7)b. above within 15 days of receipt of the notification and the department shall respond within 10 business days in accordance with (7)a. or b. above;

(9) If, within 30 days of receipt of an initial notification of an incomplete application pursuant to (7)b. above, the department does not receive the enumerated items pursuant to (7)b. above, the application shall be closed and the applicant shall start over with a new application, to include all fees in accordance with the fee schedule outlined in Ed 505.08;

(10) Within 30 days of receipt of a complete application the department shall send written notification to the senior educational official and the applicant of either:

a. Approval in the form of an intern authorization in the endorsement area for which the applicant applied, if the department determines that:

- 1. The assessment of the competencies of the applicant meet the requirements as enumerated in Ed 505.03, and the endorsement area enumerated in Ed 506, Ed 507, or Ed 508 as applicable based on the endorsement sought;
- 2. The plan, including the competency to be acquired, the activity to be undertaken, the projected completion date, and the evidence to be provided upon completion, are directly related to and will substantiate meeting the competency within the period of the plan; and
- 3. The plan was developed collaboratively and agreed to by the applicant, the mentor, and the senior educational official; or

b. Denial after a determination that the plan does not meet the requirements outlined in Ed 505.09(f)(9)a. 1. through 3. above;

(11) A SOE credential holder in receipt of a denial pursuant to (10)b. above may reapply for an intern authorization, to include the fee in accordance with the fee schedule outlined in Ed 505.08, under the following circumstances:

- a. The 180-day time period in (4) above has not lapsed and will not lapse during the new application period; and

b. The SOE credential holder shall not apply for an intern authorization more than twice per endorsement;

(12) Upon approval of the plan, the department shall grant an intern authorization, valid for up to 3 years from the first date of employment in the endorsement area sought, to coincide with the time period in the plan, limited to no more than twice per endorsement;

(13) A SBLP shall be canceled, and the intern authorization shall automatically expire, if the applicant fails to attain the skills and knowledge agreed to by the applicant within the time frame specified by the plan;

(14) The department, at the request of the senior educational official, shall grant an extension to the intern authorization period of not more than one year to accommodate an issue outside of the applicant's control which prevents timely completion of the plan including, but not limited to:

a. Illness of the applicant or immediate member of the applicant's family; and

b. Availability of a required course within the timeframe of the plan where no comparable course is available;

(15) The senior educational official, in consultation with the mentor, shall file a report at the end of each school year attesting to the applicant's progress toward meeting the requirements of the plan;

(16) Once a completed plan is filed with the department, the applicant may:

a. Obtain employment in a similar position with another school employer provided that:

1. The duration for plan completion does not change;

2. The department is notified in writing of the change in place of employment; and

3. The plan is revised as follows:

(i) Approved by the mentor assigned in the new school of employment;

(ii) Approved by the senior educational official in the new school of employment; and

(iii) Resubmitted to the department for approval pursuant to the timeline outlined in Ed 505.09(f)(6)-(10);

b. Have an intern authorization deactivated upon loss of employment until such time as the educator gains employment with another employer as described in (15)a. above; so long as the total duration of time employed under an active plan shall not exceed 3 years;

(17) Within 5 business days of the upload specified in (16) above, the intern shall complete and file a “Site-Based Licensing Plan Completer” form, January 2020 along with the appropriate fee pursuant to Ed 505.08;

(18) The senior educational official shall complete and upload to the EIS a final report for department review attesting to the intern’s completion of the SBLP which shall include:

- a. A copy of the plan, including the competency to be acquired, the activity to be undertaken, the projected completion date, and the evidence to be provided upon completion;
- b. The evidence of plan completion;
- c. A signature page which certifies that the completed plan was reviewed and approved by the applicant, the mentor, and the senior educational official;

(19) The department shall, within 30 days of receipt of a “Site-Based Licensing Plan Completer” form, January 2020, notify the applicant that either:

- a. The application is complete and pending evaluation; or
- b. The application is incomplete and enumerate the items that the applicant must address in order for the application to be complete;

(20) An applicant shall respond to a notification following the timeline established in (7) and (8) above;

(21) Within 60 days of the department’s receipt of a complete “Site-Based Licensing Plan Completer” form, January 2020, the department shall send written notification to the senior educational official and the applicant of either:

- a. Approval in the form of an intern authorization in the endorsement area for which the applicant applied if the department determines that the final report documents confirm that the intern has met all the competencies and requirements for full licensure; or
- b. A determination that the completion documentation, the final report, or both, do not reflect the documentation required by the approved plan to indicate that the candidate has met all of the competencies and requirements for full licensure and outlines the documentation required to support completion of the plan;

(22) Upon receipt of notification that the department does not approve the application in accordance with (21)b. above, the senior educational official shall, within 10 business days, upload the required documentation to support completion of the plan or the intern authorization shall expire in accordance with Ed 505.09(f)(13); and

(23) Applicants shall receive a beginning educator license or added endorsement on an existing license after approval by the department pursuant to (22)a. above.

Appendix I

Rule	Specific State Statute the Rule Implements
Ed 505.01	RSA 21-N:9, II(s)
Ed 505.02 - 505.03	RSA 21-N:9, II(s); RSA 186:11, X(a)
Ed 505.04	RSA 21-N:9, II(s); RSA 186:11, X(a); RSA 186:8, IV
Ed 505.05 - Ed 505.06	RSA 21-N:9, II(s); RSA 186:11, X(a)
Ed 505.07	RSA 21-N:9, II(s); RSA 186:11, X(a)
Ed 505.08	RSA 186:11, X(a) and (b); RSA 200:29
Ed 505.09	RSA 186:11, X(a) ; RSA 541-A:29

Readopt with amendment and renumber Ed 507.01, effective 2-22-13 (Document #10276), as Ed 506.09, and hold Ed 507.01 in reserve so that Ed 506.09 reads as follows:

Ed 506.09 Career and Technical Education Director.

(a) An individual shall have the following entry level requirements to be licensed as a career and technical education director:

(1) Have completed at least 3 years of successful paid and progressively responsible experience as a career and technical educator, with experience within the 5 years prior to the application as an administrator, supervisor, or teacher; and

(2) One of the following:

a. Completed a master's program in educational leadership or a related area; or

b. Completed a master's program in education, and demonstrated:

1. The competencies, skills, and knowledge as listed in (c) below; or

2. Experience in comparable leadership positions in career and technical education or other professions as specified in Ed 505.03.

(b) Candidates shall file the following materials and documents with the bureau of credentialing:

(1) Application forms and materials pursuant to Ed 505.07 through Ed 505.09;

(2) Previous work record;

(3) Education record; and

(4) A minimum of 3 confidential references from persons who can attest to the candidate's proficiencies in the required leadership area.

(c) Qualifications for career and technical education director shall include the following skills, competencies, and knowledge in the following areas:

(1) The principles and techniques of effective human resource management, including the following relating to career and technical education personnel:

a. Recruitment and selection;

b. Assignment and deployment of personnel;

c. Supervision;

d. Instructional leadership and support; and

e. Evaluation;

(2) Fiscal management in the development and administration of a budget;

- (3) Preparation and management of local, state and federal fund budgets;
- (4) Preparation of state and federal applications and proposals;
- (5) Maintenance of records and inventory of all buildings, equipment and supplies;
- (6) Preparation and submittal of all state and federal reports as required by law;
- (7) Solicitation of input from students, parents, school administrators at the secondary and postsecondary level, teachers at the secondary and postsecondary level, and the business community in the region served by a career and technical education center and consideration of that input in the development of:
 - a. Data collection;
 - b. School calendars;
 - c. Scheduling;
 - d. Transportation; and
 - e. Budgets;
- (8) Leadership of career and technical education competency-based programs at a center designated as a regional center under RSA 188-E, including:
 - a. Regional agreements;
 - b. Program promotion and marketing;
 - c. Student recruitment and retainment;
 - d. Admissions policies;
 - e. Regional and program advisory committees; and
 - f. Career and technical student organizations;
- (9) The principles and techniques of leadership for learners including:
 - a. Theories of human development, adult learning, and motivation and the ability to apply this knowledge to conduct effective professional development for beginning and experienced educators;
 - b. Theories, principles, and best practices of staff supervision and evaluation and their link to effective implementation of competency-based instruction and assessment;
 - c. A variety of theories, principles, and best practices for needs-based professional development programs that support the goals of the school district's improvement plan;

- d. The value of assessing, using, and conducting research to improve student learning;
- e. The development of comprehensive systems of education that foster success for all students, including students with disabilities as well as gifted and talented students;
- f. Planning and facilitating the implementation of a developmentally appropriate competency-based comprehensive curriculum, instruction, and assessment program that includes the effective use of data to improve student learning;
- g. The reporting and use of assessment results to:
 - 1. Inform the school community;
 - 2. Develop school action plans, and;
 - 3. Modify school programs; and
- h. The integrated use of technology, telecommunications and information systems to support curriculum, instruction, and assessment;

(10) In-depth understanding of the relevancy between career and technical program offerings and the needs of business and industry on a regional and state-wide basis that includes:

- a. An understanding of the up-to-date employment needs of business and industry with an ability to direct program outcomes to align with these needs;
- b. An understanding of utilizing labor market data to direct program outcomes and consistent communication with business and industry to ensure relevance; and
- c. Rigor in all career and technical education programs;

(11) Solicitation of input from students, parents, school administrators at the secondary and postsecondary level, teachers at the secondary and postsecondary level, and the business community in the region served by a career and technical education center and consideration of that input in the development and implementation of:

- a. Competency-based curriculum;
- b. State performance indicators relating to data-driven curriculum and student assessment;
- c. Formulation of short- and long-range improvement plans;
- d. Use of technology in support of all school operations; and
- e. Providing customized training programs for teachers in the areas of businesses, industry, labor and government as they relate to economic trends and programming at the center;

(12) Relationship of career and technical education to all other curricular areas, integrating these areas consistent with RSA 193-C:3, III and all aspects of industry into the career and technical program curriculum;

(13) Management of career and technical programs which includes purchasing of equipment and supplies and supervising and maintaining laboratory facilities;

(14) Implementation of the federal, state, and local laws and policies relating to legal requirements for schools, contract management and safe environments and incorporating appropriate safety standards in all learning areas; and

(15) Participation in professional organizations relating to career and technical education and career and technical administration.

Readopt with amendment Ed 507.06, effective 2-20-15 (Document #10785), as Ed 506.10, and hold Ed 507.06 in reserve, so that Ed 506.10 reads as follows:

Ed 506.10 School Counseling Director.

(a) An individual shall have the following entry level education and employment experiences to be licensed as a school counseling director:

(1) Completion of a state board of education approved school counseling program at the master's degree level or higher;

(2) Current possession of New Hampshire license as a school counselor; and

(3) At least 3 years of successful paid and progressively responsible experience in the field of school counseling, with recent leadership experience that encompasses comprehensive knowledge of school operations.

(b) A candidate for licensure as a school counseling director shall have the following skills, competencies, and knowledge through a combination of academic and supervised practical experiences:

(1) The skills, competencies, and knowledge required under Ed 508.01 for a school counselor; and

(2) Skills, competencies, and knowledge relative to the principles and techniques of effective staff and program management as they relate to school counseling in the areas of:

a. Recruitment and selection;

b. Assignment and deployment of personnel;

c. Supervision;

d. Leadership and support;

e. Development and implementation of a comprehensive program;

f. School equity and civil rights issues;

- g. Integrated use of technology and information systems;
- h. State and national laws, rules, policies, and ethical guidelines; and
- i. Individual and program evaluation.

Change the part heading for Ed 508 to read as follows:

Part Ed 508 REQUIREMENTS FOR EDUCATIONAL SPECIALISTS AND INSTRUCTIONAL SPECIALISTS

Readopt with amendment and renumber Ed 507.07, effective 2-20-15 (Document #10785), as Ed 508.01, and hold Ed 507.07 in reserve, so that Ed 508.01 reads as follows:

Ed 508.01 School Counselor.

(a) An individual shall have the following entry level requirements to be a licensed school counselor:

- (1) Have completed a state board of education approved school counseling collegiate program at the master's degree level or higher; or
- (2) Have acquired the competencies, skills, and knowledge of a school counselor through:
 - a. Completion of courses related to school counseling at the master's degree level or higher and completion of a counseling internship in a public school setting; or
 - b. Experience in comparable positions in school counseling or other master's level or higher professions closely related to school counseling.

(b) A candidate for licensure as a school counselor shall have the following skills, competencies, and knowledge in the following areas:

- (1) In the area of comprehensive school counseling programs, the ability to:
 - a. Align the school counseling program with school district mission and goals;
 - b. Design, develop, implement, and evaluate a school counseling program based on state and national models;
 - c. Include and implement career, academic, and personal-social competencies for student learning;
 - d. Integrate the program into a total school curriculum;
 - e. Develop and implement a school counseling calendar;
 - f. Use data for program design to be responsive to school needs; and
 - g. Apply knowledge of state standards to program goals;

(2) In the area of foundations of school counseling, knowledge and skills that include:

a. Legal and professional standards, including:

(i) The American School Counselor Association (ASCA) Ethical Standards for School Counselors, revised 2016, as referenced in Appendix II;

(ii) ASCA 2019 School Counselor Professional Standards & Competencies, as referenced in Appendix II; and

(iii) ASCA 2014 Mindsets and Behaviors for Student Success: K-12 College- and Career-Readiness Standards for Every Student, as referenced in Appendix II;

b. Confidentiality in a school setting;

c. Collaboration, teamwork and supervision and the ability to apply self-awareness;

d. Basic counseling skills and techniques;

e. The ability to translate counseling theory into the practice of school counseling;

f. The ability to apply a knowledge of human growth & development to the school counseling program;

g. The ability to build a school counseling program that includes the student domains of academic, career, and personal-social; and

h. Multicultural counseling competencies;

(3) In the area of management of school counseling, the ability to:

a. Use data to analyze current program needs;

b. Use technology in school counseling, record-keeping, and student information systems;

c. Formulate, follow, and evaluate student, school, and community needs;

d. Manage and address the cyclical needs of students, including the cyclical nature of the school year;

e. Gather data and translate data into understandable reports for others including state, colleges, town, teachers, students, and teams;

f. Communicate about the counseling program to students, teachers, school boards, administrators, and parents;

g. Participate in, or build and implement a counselor evaluation system;

h. Build leadership skills in self and others; and

- i. Develop and participate in an advisory committee to the school counseling program;
- (4) In the area of delivery of the school counseling program, the skills and abilities to:
- a. Develop and implement curriculum that is for all students;
 - b. Apply effective short-term individual and group counseling;
 - c. Develop and apply crisis prevention and response;
 - d. Understand and utilize current research and practices in counseling theories, family systems, human development, and community needs;
 - e. Address student needs for college and career readiness knowledge and skills; and
 - f. Apply presentation skills and group management; and
- (5) In the area of accountability, knowledge, skills, and application in:
- a. Research and assessment;
 - b. Scheduling and graduation requirements;
 - c. Counselor-to-student ratios;
 - d. Data-gathering for accountability;
 - e. Advocacy of the role of school counselor;
 - f. Advocacy of the school counseling program including the ability to report yearly, to relevant partners, on the effect of the school counseling program on attendance, behavior, and student learning outcomes;
 - g. Self-reflection and peer supervision; and
 - h. Management of one's own continuing professional development.

Readopt with amendment and renumber Ed 507.08, effective 2-20-15 (Document #10785), as Ed 508.02, and hold Ed 507.08 in reserve, so that Ed 508.02 reads as follows:

Ed 508.02 School Psychologist.

(a) The following shall be the entry level requirements for an individual to be licensed as school psychologist:

- (1) Completion of any state board of education approved school psychology program at the doctoral, certificate of advanced graduate study, specialist, or master's level; or
- (2) Meeting both of the following requirements:

- a. Completion of at least 60 semester hours or the equivalent of graduate study culminating in at least a master's degree, of which at least 54 hours are exclusive of credit for the supervised internship experience as described in b.; and
- b. Experience in a supervised internship in a general school setting for 1,200 clock hours, full-time over one year or half time over 2 consecutive years in a general school setting, provided that if additional experiences are provided in mental health clinics, psychiatric hospitals, and other institutions for children, such experiences shall not replace the supervised internship in a general school setting for more than 600 of the 1,200 hours.

(b) A candidate for licensure as a school psychologist shall have the skills, competencies, and knowledge in the following areas:

(1) Practices that permeate all aspects of service delivery through:

- a. Data-based decision making and accountability; and
- b. Consultation and collaboration;

(2) Direct and indirect services for children, families and schools which include:

a. Student-level services including:

1. Conducting, interpreting, and communicating the findings of assessments of students, including but not limited to their:

- (i) Intellectual ability;
- (ii) Cognitive processing;
- (iii) Academic achievement;
- (iv) Behavior;
- (v) Social and emotional functioning;
- (vi) Learning environments; and
- (vii) Adaptive functioning;

2. Designing, implementing, monitoring, and adapting instructional and behavioral supports and interventions; and

3. Creating, implementing, and evaluating mental health interventions and direct services to develop social/emotional and life skills;

b. Systems-level services including:

1. Interacting effectively in a school setting by understanding systems, roles, curriculum, instruction, and assessment to promote socialization, learning, and mental health; and
 2. Implementing and evaluating school wide practices that promote learning; and
 - c. Preventative and responsive services including:
 1. Applying principles of resilience and risk factors in learning and mental health;
 2. Promoting multi-tiered systems of support; and
 3. Formulating evidence-based strategies for effective crisis preparation, response, and recovery; and
- (3) Foundations of professional school psychological services which include:
- a. Understanding and analyzing the diversity in human development and learning including culture, context, and individual differences;
 - b. Explaining typical and atypical psychological and educational development in children and youth;
 - c. Synthesizing, evaluating, and applying theories and models of research, empirical findings, and techniques related to student learning;
 - d. Utilizing research design, statistics, measurement, and varied data collection and analysis techniques;
 - e. Designing and implementing program evaluation to support evidence-based practices at the individual, group, and/or systems levels;
 - f. Integrating the history and foundations of psychology into a professional identity and practice as a school psychologist; and
 - g. Adhering to ethical, legal, and professional standards including:
 1. Ethical and professional decision making; and
 2. Professional work characteristics and disposition that reflect personal integrity.

Readopt with amendment and renumber Ed 507.14, effective 3-24-17 (Document #12144), as Ed 508.03, and hold Ed 507.14 in reserve, so that Ed 508.03 reads as follows:

Ed 508.03 School Social Worker.

- (a) For an individual to be licensed as a school social worker, the individual shall:

- (1) Have completed a master's level specialist program in school social work consisting of a full time, or its equivalent in part-time, coordinated sequence of specifically focused study at the graduate level, culminating in at least a master's degree in the area of social work from an accredited institution; or
 - (2) Have earned a master's degree in social work and one of the following:
 - a. Have completed an approved conversion program in school social work which shall include a 2-year internship supervised by a licensed school social worker; or
 - b. Have acquired the knowledge and skills of a school social worker under Ed 505.04, or Ed 505.05.
- (b) A candidate for licensure as a school social worker shall have skills, competencies, and knowledge in the following areas:
- (1) Social welfare and educational policy, including:
 - a. History of education, social work, and human services systems;
 - b. Role of policy at local, state, and national levels in education and school social work practice;
 - c. Process of policy formation and implementation and its impact on student and family systems, schools, organizations, and communities;
 - d. Use of policy practice to analyze, influence, and advocate; and
 - e. State and federal laws related to school social work practice, such as education, special education, 504, child welfare, homeless and displaced students, mental health, and juvenile justice;
 - (2) Social work values and ethics, including:
 - a. Mission of public education;
 - b. Mission of school social work to insure student learning, educational equity, and social justice for every student by reducing or eliminating the social, economic, and environmental barriers;
 - c. Demonstration and promotion of the values of the profession as delineated in the National Association of Social Workers (NASW) Code of Ethics (2017), as specified in Appendix II;
 - d. Professional school social work and pupil services standards as stated in the NASW Standards for School Social Work Services (2012), as specified in Appendix II; and
 - e. Ability to use an ethical decision-making model to guide practice;
 - (3) Social and economic justice and populations at risk, including:

- a. Understanding risk/resiliency factors for populations at risk;
- b. Understanding the dynamics of risk factors for school failure and the strategies to address them;
- c. Understanding how group membership and various forms of oppression affect access to resources and educational opportunities;
- d. Strategies to combat discrimination, oppression, institutional racism, and economic deprivation;
- e. Advocacy for non-discriminatory social and economic systems; and
- f. Identification of inequities in access to school and community programs and services for children, youth, and families;

(4) Skills in systematic assessments, data gathering, and interpretation at multiple levels using a variety of methods to assess the needs, characteristics, and interactions of students, families, and school personnel;

(5) Effective prevention and intervention with individuals, families, schools, and communities including:

- a. Utilization of a strength-based approach to enhance students' capacities, with special emphasis on students in populations at risk;
- b. Design and implementation of practice strategies with persons from diverse backgrounds;
- c. Partnership with families and others to resolve challenges in the home, school, and community;
- d. Counseling;
- e. Crisis intervention and other mental health services;
- f. Casework and case management;
- g. Group work;
- h. Mediation and conflict resolution;
- i. Advocacy;
- j. Development of positive behavioral intervention strategies for all students;
- k. Program development and management;
- l. Provision of professional development and community education;

m. Collaboration, consultation, and coordination as leaders or members of interdisciplinary teams and community partnerships; and

n. Community organization, including mobilization of school and community resources;

(6) Human behavior and social environment, including:

a. Biological, psychological, and sociological variables affecting development, learning, and educational achievement; and

b. Application of theoretical frameworks to understand the interaction among individuals and between individuals and social systems such as families, groups, organizations, and communities;

(7) Diversity, including:

a. Cultural factors in race, gender, ethnicity, sexual orientation, and social class and how culture affects individual, family, group, organizational, and community behavior;

b. Understanding of, and affirmation and respect for, people from diverse backgrounds and recognition of diversity within and between groups;

c. Development of trust, open communication, mutual respect, and ongoing collaboration with members of diverse populations; and

d. Ability to take cultural and other diversity factors into account in assessments and interventions; and

(8) Research, including:

a. Qualitative and quantitative methodologies; and

b. Use of practice literature and empirically-based knowledge in the areas of children, youth, families, and schools to:

1. Provide school social work services and educational interventions;

2. Monitor and assess programs and services;

3. Monitor and assess academic and social progress; and

4. Initiate change and improve practice, policy, and programs.

(c) For the purposes of Ed 507.14, populations at risk shall include, but not be limited to:

(1) Children with special educational needs;

(2) School age parents;

(3) Homeless youth and families;

- (4) Students affected by mental health and substance misuse issues;
- (5) Lesbian, gay, bisexual, transgender, and questioning youth;
- (6) Abused and neglected students;
- (7) Students living in poverty;
- (8) Children of color;
- (9) Adjudicated and incarcerated youth;
- (10) English language learners;
- (11) Students whose families are in crisis; and
- (12) Other marginalized groups of students.

Readopt with amendment and renumber Ed 507.19, effective 5-31-18 (Document #12539), as Ed 508.04, and hold Ed 507.19 in reserve, so that Ed 508.04 reads as follows:

Ed 508.04 Specialist in Assessment of Intellectual Functioning (SAIF).

(a) To be licensed as a specialist in assessment of intellectual functioning (SAIF), an individual shall:

- (1) Hold a master's degree and a valid:
 - a. Beginning educator or experienced educator license from the state board in education, school counseling, administration, or speech language specialist;
 - b. License as a psychologist from the New Hampshire board of psychologists;
 - c. License as an occupational therapist from the governing board of occupational therapists; or
 - d. License as a speech-language pathologist from the governing board of speech-language pathologists;
- (2) Have at least 4 years of documented school experience in education, school counseling, administration, speech therapy, or occupational therapy; and
- (3) Either:
 - a. Have successfully completed a SAIF program approved by the state board of education; or
 - b. Have acquired the competencies, skills and knowledge described in (b) below through other experiences and training so as to qualify under Ed 505.06, Demonstrated Competencies.

(b) To qualify as a SAIF, an individual shall have the following:

(1) Knowledge of:

- a. Relevant local, state, and federal laws, policies, regulations, and procedures pertaining to education;
- b. General principles of learning and research-validated teaching strategies;
- c. Human development theory, including application to children in a school setting;
- d. The learning characteristics of individuals with disabilities;
- e. Statistics, research methods, and professional literature pertinent to the processes of assessment and program development; and
- f. Those ethical principles applicable to the professional school psychology practice in the reporting of assessment results to school teams aimed at protecting the rights of individuals as set forth in the National Association of School Psychologists Principles for Professional Ethics (2010) as referenced in Appendix II; and

(2) Competency and skill in:

- a. Developing professional interactions for the purpose of obtaining and communicating information;
- b. Consulting with staff members and parents regarding students' current and future needs;
- c. Translating referral questions and concerns into a set of assessment procedures that follow Ed 1107 and 20 U.S.C. 1400;
- d. Administering, scoring, and interpreting assessments of individual intelligence and cognitive processing, assessments of academic achievement, and assessments of functional achievement;
- e. Conducting a test session with sufficient proficiency to ensure fluent administration and adding meaningful clinical observation concerning the test session, as well as having sufficient expertise to reflect on the student's performance and its implication for further assessment;
- f. Integrating background information and assessment results into a description of how the child learns;
- g. Developing appropriate recommendations based upon assessments and best practices;
- h. Assisting team members in planning strategies and interventions for students and assessing their effectiveness; and

i. Assisting the administration in planning and facilitating professional development and improvement efforts; and

(3) Expertise in:

a. The nature, uses, and limitations of a variety of psychological educational assessments; and

b. Research-validated educational accommodations, modification, supports, and interventions.

Readopt with amendment and renumber Ed 507.23, effective 9-20-17 (Document #12384), as Ed 508.05, and hold Ed 507.23 in reserve, so that Ed 508.05 reads as follows:

Ed 508.05 School Speech-Language Specialist.

(a) To be licensed as a speech-language specialist, a candidate shall meet the following entry level requirements:

(1) The general education requirements specified in Ed 505.02, if applicable;

(2) The professional education requirements specified in Ed 505.03, if applicable; and

(3) Hold a master's degree in speech-language pathology or communication sciences and disorders and meet the speech-language specialist competencies.

(b) A candidate for licensure as a speech-language specialist shall have skills, competencies, and knowledge in the following areas:

(1) In the area of core competencies in communication:

a. A knowledge of professional conduct including how to understand and respect student and family confidentiality;

b. A knowledge of basic communication science, which for this field shall include:

1. Normal language acquisition and implications for multi-cultural application;

2. Phonetics and phonology;

3. Speech and hearing science;

4. Basic audiology;

5. Anatomy and physiology of the speech and hearing mechanism;

6. Neurology of speech and language; and

7. Swallowing;

c. A knowledge of assessment and intervention techniques related to a broad range of disabilities students might exhibit, any one or combination of which might affect their academic performance and thus place them at risk in terms of their receiving a free and appropriate public education in the least restrictive environment, including the following:

1. Fluency disorders such as stuttering;
2. Organic pathologies such as cerebral palsy and traumatic brain injury;
3. Articulation and phonological disorders;
4. Language disorders, including expressive, receptive, and social pragmatic language disorders;
5. Phonological awareness in relation to literacy disorders;
6. Auditory perception, including central auditory processing disorders;
7. Voice and resonance disorders;
8. Augmentative and alternative communication (AAC) modalities such as sign language and speech generating devices; and
9. Autism spectrum disorders;

d. The ability to evaluate existing research, conduct and interpret applied research, and utilize evidence-based practices in assessment and intervention;

e. The ability to administer and interpret the results of a variety of formal and informal screening tools and diagnostic instruments in the areas of:

1. Phonology and articulation; including motor speech disorders;
2. Early childhood and school age language;
3. Oral language as it relates to expressive and receptive language;
4. Dysphagia;
5. Fluency;
6. Hearing and auditory processing disorders;
7. Voice and resonance; and
8. Augmentative and alternative communication (AAC);

f. A knowledge of diagnostics and evaluation to identify the presence of a communication disorder and identify an educational disability in the area of speech, language, or hearing impairment which shall include the ability to:

1. Collect quantitative and qualitative data to assist in identifying:

- (i) Student learning strengths and needs;
- (ii) Learning styles; and
- (iii) Interpersonal skills; and

2. Demonstrate the ability to synthesize data and to develop individualized education programs and methods of assessing progress as described in Ed 1109 and 34 CFR 300.320; and

g. A knowledge of and skills necessary to implement various evidence-based models of service delivery such as individual and group; direct, collaborative and consultative relative to specific communication disorders listed in Ed 508.05(b)(1)c. which shall include the ability to:

- 1. Coordinate the provision of services with other school personnel who provide non-speech and language services to students;
- 2. Apply evidence-based practices in developing and integrating therapeutic goals within the classroom, curriculum or both;
- 3. Demonstrate the ability to evaluate the attainment of treatment goals in relation to the curriculum using:
 - (i) Qualitative methods, including but not limited to educator reports, student reports, and observations; and
 - (ii) Quantitative methods, including but not limited to the use of standardized tests; and
- 4. Modify individual student programs based on on-going assessment; and

(2) Concerning school-based delivery systems:

- a. A knowledge of educational systems including school operations and administrative organizations;
- b. A knowledge of general and special education laws, including but not limited to federal statutes and regulations, state statutes and rules, and related case law;
- c. The ability to participate in the development of individualized education programs and accommodation plans as outlined in Section 504 of the Rehabilitation Act of 1973;
- d. The ability to analyze, evaluate, and employ curriculum and classroom-based teaching techniques and materials to support speech and language development;
- e. The ability to understand the relationship between communication, language, and reading and writing in classroom-based instruction;

f. The ability to develop, evaluate, and modify curriculum and monitor student progress in academic areas as related to speech, language, and communication;

g. A knowledge of school, community, state and federal resources to support students and their families in the school setting;

h. A knowledge of methods and activities for integrating life skills into specific subject areas and related services to promote independent living, social and interpersonal skills;

j. The ability to supervise paraeducators, tutors, or speech-language assistants in targeting and generalizing speech and language goals; and

k. The ability to utilize augmentative and alternative communication systems and technology to foster the participation, interaction, and inclusion of children for whom speech is not their primary mode of communication.

(d) Any person who is licensed in the state of New Hampshire as a speech-language pathologist by the governing board of speech-language pathologists shall be considered to have met the requirements of Ed 508.05.

Readopt with amendment and renumber Ed 507.20, effective 2-22-13 (Document #10276), as Ed 508.07 and hold Ed 507.20 in reserve, so that Ed 508.06 reads as follows:

Ed 508.06 Library Media Coordinator.

(a) A candidate shall have the following entry level requirements to be licensed as a library media coordinator:

- (1) Have completed a minimum of 3 years' experience as a library media specialist as documented by positive recommendations or evaluations from the candidate's supervisor(s) which demonstrate that the candidate has acquired the competencies outlined in Ed 507.21; and
- (2) Have at least completed a master's degree program in library science, library and information studies, or a closely related field such as education.

(b) Candidates shall file the following materials and documents with the bureau of credentialing:

- (1) Completed application forms containing the information required in Ed 508.04;
- (2) Previous work record;
- (3) Education record; and
- (4) A minimum of 3 confidential references from persons who can attest to the candidate's proficiencies in the required leadership area.

(c) Candidates for licensure as a library media coordinator shall have skills, competencies, and knowledge in the following areas:

- (1) In the area of program management and leadership, the ability to:

- a. Provide effective leadership and coordination in developing, implementing, and evaluating a comprehensive, system-wide school library media program;
- b. Develop and implement a strategic plan for the school library media program to meet system-wide goals while allowing for differences of individual schools;
- c. Communicate the school library media program's vision, goals, and priorities to the educational system and the community;
- d. Coordinate collection development and programming for system-wide libraries;
- e. Plan and manage information literacy instruction efforts for students and teachers;
- f. Plan and manage virtual and physical resources, systems, and services to support teaching and learning;
- g. Coordinate the planning and design of new, renovated, and existing school library media facilities and system-wide infrastructure;
- h. Develop policy recommendations and implement established adopted policies and procedures; and
- i. Advocate for the centrality of the library media program to the learning of students;

(2) In the area of fiscal management, the ability to:

- a. Prepare budgets in collaboration with school leaders, departments, or agencies to ensure equitable services and resources;
- b. Maintain accurate records and inventories to prepare reports; and
- c. Research grants and other external funding opportunities for the support and enhancement of student learning resources and results;

(3) In the area of information management, the ability to:

- a. Provide trustworthy information on promising and proven practices keyed to system-wide priorities to improve student achievement as well as educator and school leader effectiveness;
- b. Collaborate with other libraries and agencies to share resources and enhance the system's learning climate, learning opportunities, and learning results;
- c. Advise all school system personnel regarding the importance of the principles of intellectual freedom and ethical behavior, and advocate for the integration of these principles in system policies and programs; and
- d. Work with system and school leaders as well as educators to ensure standardization of equipment and equity of resources across programs and buildings; and

(4) In the area of personnel management, the ability to:

- a. Advocate for the American Association of School Librarians (AASL) recommended level of staffing for school library media centers;
- b. Collaborate with principals and site-based committees in the selection and placement of school library media personnel; and
- c. Work with school leaders to supervise, support and evaluate the system's school library media personnel in the operation of their school library media program.

Readopt with amendment and renumber Ed 507.21, effective 6-22-12 (Document #10151), as Ed 508.07, and hold Ed 507.21 in reserve, so that Ed 508.07 reads as follows:

Ed 508.07 Library Media Specialist.

(a) To be licensed as a library media specialist, the candidate shall have a bachelor's degree.

(b) A candidate for licensure as a library media specialist shall have skills, competencies, and knowledge in the following areas:

(1) In the area of teaching for learning, the ability to:

a. Demonstrate that she or he is a skilled instructional specialist who ensures that learners become effective and ethical users and creators of ideas and information, through:

1. Applying knowledge of learners and learning, including:

- (i) Learning styles;
- (ii) Stages of human development;
- (iii) Cultural influences; and
- (iv) Physical and intellectual abilities and needs;

2. Providing instruction in multiple literacies;

3. Promoting inquiry-based learning; and

4. Providing authentic learning experiences;

b. Design and implement instructional strategies that engage students' interests and develop their ability to:

- 1. Inquire;
- 2. Think both critically and creatively; and
- 3. Ethically gain and share knowledge;

- c. Utilize the assessment of student learning to inform practice;
- d. Model, share, and promote effective principles of teaching and learning as collaborative partners with other educators;
- e. Collaborate with students, other educators, and administrators to efficiently access, interpret, and communicate information;
- f. Design and provide professional development which enables other educators and administrators to:
 - 1. Locate research-based information relevant to their professional practice; and
 - 2. Integrate best practices into their curricula; and
- g. Integrate the use of current technologies as a means for effective and creative teaching and to support students' conceptual understanding, critical thinking, and creative processes;

(2) In the area of literacy and reading, the ability to:

- a. Demonstrate knowledge of children's, young adult, and professional literature to guide and support reading for information, reading for pleasure, and reading for lifelong learning in multiple languages and formats such as but not limited to materials in print, e-book, digital, audio, and braille;
- b. Use a variety of strategies to promote reading, viewing, and listening, for learning, personal growth, and enjoyment;
- c. Develop a collection of reading and information materials in print and digital formats that support the diverse developmental, cultural, social, and linguistic needs of the learning community;
- d. Collaborate with staff to design and implement authentic and engaging instructional strategies that reinforce reading instruction to ensure students are able to create meaning from text;
- e. Model personal enjoyment of reading in order to motivate lifelong reading in students; and
- f. Integrate the use of current technologies that support literacy and reading;

(3) In the area of information and knowledge, the ability to:

- a. Model multiple strategies for students, teachers and administrators and other members of the school community to locate, evaluate, and ethically use information;
- b. Identify physical, socioeconomic, and intellectual barriers to equitable school, home and community access to learning resources and services;

- c. Develop and promote solutions to address barriers to equitable access to learning resources and services;
- d. Provide a variety of learning resources and services to support the needs of diverse learners;
- e. Support flexible, open access to library services, including, but not limited to 24/7 access to online databases, library websites, and related instructional support resources;
- f. Model and communicate the legal and ethical principles of the profession;
- g. Demonstrate proficiency in the use of 21st century tools to continuously improve their professional practice; and
- h. Interpret and use a variety of data, including evidence-based action research, to create and share new knowledge to improve practice in school libraries;

(4) In the area of advocacy and leadership, the ability to:

- a. Utilize evidence-based practice and research to communicate the centrality of the library program to a school's ability to:
 - 1. Meet and exceed local, state and national content standards;
 - 2. Improve student learning;
 - 3. Meet the challenges of the learners, the skills, and the learning environments of the 21st century; and
 - 4. Integrate the use of current technologies as a means for effective and creative teaching and learning;
- b. Advocate for intellectual freedom, equity of access, and privacy rights;
- c. Educate the school community on the ethical use of information and ideas;
- d. Establish connections with other libraries and strengthen cooperation among library colleagues for resource sharing, networking, and facilitating access to information;
- e. Plan for and participate in ongoing professional growth and leadership opportunities, informed by reflective practice;
- f. Engage in school improvement processes, such as but not limited to curriculum development; and
- g. Document and communicate the impact of collaborative instruction on student learning; and

(5) In the area of program management and administration, the ability to:

- a. Communicate and collaborate with students, staff, administrators, and community members to design and develop a library program that aligns resources and services with the school's mission, in accordance with New Hampshire school approval standards Ed 306.08, instructional resources, and Ed 306.42, digital literacy program;
- b. Manage, organize, and evaluate school library physical resources such as facilities, fiscal resources such as budgets, and human resources such as personnel, including volunteers, to enhance the use of information resources and services and to ensure equitable access to all resources for all users;
- c. Make use of data to evaluate and improve the school library program;
- d. Develop, implement, and evaluate policies and procedures consistent with:
 - 1. School, district, state, and national standards;
 - 2. Relevant laws and legislation;
 - 3. Privacy rights;
 - 4. Equity of access; and
 - 5. The tenets of intellectual freedom;
- e. Create and implement a collection development policy that demonstrates knowledge of principles related to selection, acquisition, organization, evaluation, and reconsideration of library resources;
- f. Evaluate and select print, non-print, and digital resources using professional selection tools and evaluation criteria to develop a relevant, balanced collection designed to meet the diverse curricular, personal, and professional needs of students, staff, and administrators;
- g. Organize a school library collection according to current library cataloging and classification principles and standards; and
- h. Ensure integration of current research findings and best practices into the school library program by keeping up to date with local, state, and national education, technology, and information initiatives.

Readopt with amendment and renumber Ed 507.22, effective 11-9-18 (Document #12662), as Ed 508.08, and hold Ed 507.22 in reserve, so that Ed 508.08 reads as follows:

Ed 508.08 Digital Learning Specialist. The following requirements shall apply to the licensure of a digital learning specialist:

- (a) To be licensed as a digital learning specialist, the candidate shall have:
 - (1) At least a bachelor's degree; and

(2) Qualify for licensure under one of the credentialing pathways in Ed 505.01 – Ed 505.05 having also met the requirements of (c) below.

(b) A candidate for licensure as a digital learning specialist shall have skills, competencies, and knowledge as a digital designer, digital learner, digital citizen, collaborative coach, and visionary leader as follows:

(1) As a digital designer, effectively use technology with differentiation, rigor, relevance, and engaging learning experiences in his or her practice of teaching, learning, and assessment by the ability to:

- a. Design and implement digitally-based learning experiences with multiple and varied formative and summative assessments;
- b. Model and promote the use of adaptive and assistive technologies and other digital tools and resources to personalize and differentiate activities for all learners;
- c. Collaborate with other educators to help design and implement the student digital portfolio processes and procedures as specified in Ed 306.42; and
- d. Promote student reflection using collaborative tools to reveal and clarify students conceptual understanding;

(2) As a digital learner, continue to deepen knowledge and expertise with technological concepts and pedagogy as follows:

- a. Use knowledge of digital tools to model, promote, and facilitate experiences that advance learner competency, creativity, and innovation in both face-to-face and virtual environments;
- b. Collaborate with other educators to promote innovative and creative thinking using digital tools to engage learners in real-world problem solving;
- c. Collaborate with other educators to model, design, and implement technology-enhanced learning experiences addressing both technology and content standards; and
- d. Illustrate how state and national standards are implemented within the curriculum;

(3) As a digital citizen, model responsible and safe participation in the digital world with the ability to:

- a. Model and promote safe, ethical, and legal practices related to digital tools and resources;
- b. Model and promote digital etiquette, awareness of digital identity and privacy, and responsible social interactions related to the use of digital tools and resources; and
- c. Model and promote diversity, cultural understanding, and global awareness using digital communication and collaborative tools and resources to interact locally and globally;

(4) As a collaborative coach, develop innovative professional learning opportunities and evaluate the impact on instructional practice and learner competencies with the ability to:

- a. Model and promote effective management and use of digital tools and resources to support technology rich learning environments;
- b. Evaluate, adapt, and reflect on digital tools, resources, and emerging trends by participating in local and global learning communities and by reviewing current research and evidence-based innovative practices; and
- c. Promote the role of digital media literacies to best equip learners to succeed in a globally interconnected, multicultural world; and

(5) As a visionary leader, promote and participate in the development and implementation of collaborative strategies for the comprehensive integration of technology to foster excellence to support transformational change throughout the instructional environment with the ability to:

- a. Promote and participate in the development and implementation of a shared vision for the comprehensive integration of technology to support learning opportunities for all learners and educators;
- b. Promote and participate in the planning, development, communication, implementation, and evaluation of technology-infused strategic plans and adoption of new digital resources and tools at the district and school levels; and
- c. Promote and participate in the implementation strategies for initiating and sustaining technology innovations and manage the change process in schools and classrooms.

Readopt with amendment and renumber Ed 507.12, effective 3-24-17 (Document #12142), as Ed 508.09, and hold Ed 507.23 in reserve, so that Ed 508.09 reads as follows:

Ed 508.09 Reading and Writing Specialist.

(a) A candidate for licensure as a reading and writing specialist for grades K-12 shall meet the following entry level requirements:

- (1) At least a master's degree in literacy or a related field;
- (2) The general education requirements specified in Ed 505.02;
- (3) The professional education requirements specified in Ed 505.03 if applicable; and
- (4) Completed at least 3 years of classroom teaching;

(b) A candidate for licensure as a reading and writing specialist for grades K-12 shall have skills, competencies, and knowledge in the following areas:

- (1) In the area of knowledge of the theoretical and evidence-based foundations of reading and writing processes and instruction, the ability to:

- a. Demonstrate knowledge of cognitive, sociocultural, and diverse linguistic foundations of reading and writing processes and instruction;
- b. Demonstrate knowledge of current practices, research, and historical developments in reading and writing;
- c. Demonstrate knowledge of language development as it relates to acquisition of reading and writing, the variations related to sociocultural and linguistic diversity, and the basics of second language acquisition;
- d. Demonstrate knowledge of the major components of reading instruction and curriculum, including the ability to:

- 1. Understand the relationship between print and sounds, including phonemic awareness, phonics, and other word identification strategies, and their role in fluent reading;
- 2. Explain how background knowledge, vocabulary knowledge, text comprehension strategies, and motivation are integrated in reading; and
- 3. Describe how reading strategies are taught across all content areas, including but not limited to English, ESOL, mathematics, science, and social studies; and

- e. Demonstrate knowledge of major components of writing instruction, including the ability to:

- 1. Demonstrate knowledge of the development of spelling, its instruction, and its relationship to word recognition and word meaning;
- 2. Demonstrate the knowledge of the mechanics of writing, including punctuation, grammar, spelling, and letter formation;
- 3. Understand recursive strategies for planning, drafting, revising, and editing writing; and
- 4. Describe models for integrating writing across the curriculum;

(2) In the area of instructional strategies and curriculum materials in reading and writing, the ability to recognize the importance of, demonstrate, and facilitate professional learning and leadership by:

- a. Selecting and implementing instructional approaches and materials that utilize evidence-based rationale, consider student needs, and support classroom teachers and paraeducators in their use of instructional strategies and grouping; and
- b. Using a wide range of evidence-based curriculum materials including structured literacy approaches in effective reading and writing instruction for struggling reluctant learners, including those identified through the screening required by RSA 200:59, I as having potential indicators or risk factors of dyslexia and related disorders at different

stages of literacy development and from different sociocultural and linguistic backgrounds;

(3) In the area of assessment and evaluation of reading and writing, the ability to:

- a. Understand the terminology, processes, and procedures used in formal and informal assessments, including English language learners' proficiency levels;
- b. Use a variety of formal and informal assessment tools and practices to plan, evaluate and communicate effective reading and writing instruction by:
 1. Supporting the classroom teacher in the assessment of the reading and writing abilities of individual students; and
 2. Extending the assessment further to determine proficiencies and difficulties for appropriate services;
- c. Use assessment information to plan, evaluate, differentiate, and revise effective instruction that meets the needs of all students, including those identified through the screening required by RSA 200:59, I as having potential indicators or risk factors of dyslexia and related disorders by:
 1. Assisting teachers, specialists, and paraeducators in using assessments to plan and implement instruction for all students;
 2. Engaging students in using assistive technology to address their needs in learning and communicating; and
 3. Collaboratively collecting, analyzing, and using school-wide assessment data to improve school and district literacy instruction and programs;
- d. Communicate results of assessments and screenings to a variety of audiences, including students, families, administrators, teachers, specialists, and policymakers; and
- e. Demonstrate knowledge of current issues, practices, and policies related to the assessment, evaluation, and instruction of reading and writing;

(4) In the area of creating a literate environment that fosters reading and writing, the ability to:

- a. Use students' interests, backgrounds, and abilities in reading and writing, as foundations for the reading and writing program, including the ability to:
 1. Assist the classroom teacher in demonstrating a respectful attitude toward all learners and understand the roles of choice, motivation, and scaffolded instructional support in creating positive and supportive environments;
 2. Assist the classroom teacher and paraeducator in selecting literature, materials, and activities that match the reading levels and writing development of all students;

- 3. Demonstrate models of teaching that provide authentic purposes for reading and writing; and
 - 4. Help the classroom teacher to use evidence-based rationale to make and monitor flexible instructional grouping options for students;
 - b. Select books, technology-based information, and non-print materials representing multiple levels, broad interest, and cultural and linguistic backgrounds;
 - c. Provide opportunities for learners to write for personal, social, academic, and vocational, or professional purposes;
 - d. Collaborate with building and district administrators to establish and to manage a literacy budget; and
 - e. Provide educational opportunities, information, and support for families and the community; and
- (5) In the area of viewing professional development as a career-long effort and responsibility, the ability to:
- a. Participate in, initiate, implement, and evaluate professional development programs;
 - b. Support, demonstrate, and assist professional development in the teaching of reading and writing to paraeducators, teachers, and administrators;
 - c. Engage in collaboration and dialogue with teachers and reading specialists to reflect on teaching practices and improve instruction;
 - d. Display positive habits related to the candidate's own reading and writing and the teaching of reading and writing, and pursue the development of individual professional knowledge and behaviors; and
 - e. Advocate for important professional needs with administrators, school boards, and local, state, and federal policymaking bodies.

Readopt with amendment and renumber Ed 507.251, effective 1-17-14 (Document #10506), as Ed 508.10 to read as follows:

Ed 508.10 Elementary Mathematics Specialist for Grades K-6.

(a) A candidate for licensure as a mathematics specialist for grades K-6 shall meet the following entry level requirements:

- (1) At least a master's degree in mathematics, education, or a related field and can document a passing score on the Praxis II Middle School Mathematics test or equivalent;
- (2) The general education requirements specified in Ed 505.02;
- (3) The professional education requirements specified in Ed 505.03;

(4) Hold a valid experienced educator endorsement; and

(5) Completed at least 3 years of successful classroom teaching of mathematics within grades pk-6.

(b) A candidate for licensure as an elementary mathematics specialist for grades pk-6 shall have skills, competencies, and knowledge in the following areas:

(1) In the area of content knowledge, the ability to:

a. Apply knowledge of major pre-K-6 mathematical concepts, algorithms, procedures and connections;

b. Demonstrate an understanding of the sequential nature of mathematics and the mathematical structures and connections inherent in the following content domains:

1. In the domain of number and operations have the ability to:

(i) Demonstrate knowledge of pre-number and early number concepts;

(ii) Interpret and represent number systems including whole numbers, integers, rationals, irrationals, reals and the application of their properties;

(iii) Demonstrate knowledge of concepts and applications of number theory including multiplicative arithmetic;

(iv) Demonstrate a variety of interpretations of the 4 operations of arithmetic and of the common ways they can be applied; and

(v) Use proportional reasoning demonstrating connections to fractions, ratios, rates, and scaling;

2. In the domain of functions and algebra have the ability to:

(i) Analyze and generalize a wide variety of patterns and functions for example linear, quadratic, and exponential moving fluently among representations including tables, graphs, written word, and symbolic rules;

(ii) Analyze change and rates of change in various contexts including proportional and inversely proportional relationships;

(iii) Model and solve problems, both mathematical and “real world,” using algebraic methods; and

(iv) Apply the conventions of algebra that is the order of operations and the properties of real numbers commutative, associative, distributive, identity, inverse, and zero properties to algebraic expressions, equations, and inequalities;

3. In the domain of measurement have the ability to:

- (i) Utilize non-standard and standard units of measure using appropriate units, techniques, and tools;
- (ii) Model and use common units of geometric measures for: angles, perimeter, area and volume, through mathematical and practical contexts;
- (iii) Employ estimation as a way of understanding measurement units and processes of measuring those attributes;
- (iv) Apply measurement conversion strategies; and
- (v) Connect proportionality to measurement including similar figures;

4. In the domain of geometry have the ability to:

- (i) Build and manipulate representations of 2- and 3-dimensional objects using concrete models, perspective drawings, projections, and dynamic geometry software;
- (ii) Analyze properties and relationships among geometric shapes and structures;
- (iii) Specify locations and describe spatial relationships using coordinate geometry;
- (iv) Apply transformations and compositions of transformations including dilations, translations, rotations, and reflections with symmetry, congruence, and similarity; and
- (v) Use geometric constructions and axiomatic reasoning to make and prove conjectures about geometric shapes and relations;

5. In the domain of data analysis and probability have the ability to:

- (i) Use data from a random sample to draw inferences about a population;
- (ii) Construct and interpret graphical displays of univariate data distributions for example, box plots and histograms;
- (iii) Summarize and describe univariate data in relation to its context by using measures including the mean, median, mode, interquartile range, and mean absolute deviation;
- (iv) Use scatterplots to analyze bivariate data and utilize lines of best fit to model the relationship between the variables; and
- (v) Determine the empirical and theoretical probability for both simple and compound events; and

c. Demonstrate knowledge of the history of mathematics, including the contributions of different individuals and cultures toward the development of mathematics and the role of mathematics in culture and society;

(2) In the area of mathematical practices have the ability to:

a. Communicate and demonstrate the importance of problem solving and its use in developing conceptual understanding;

b. Represent and model mathematical ideas;

c. Reason abstractly, reflectively, and quantitatively including constructing viable arguments and proofs;

d. Attend to precision;

e. Identify elements of structure and express regularity in patterns of mathematical reasoning;

f. Utilize appropriate mathematical vocabulary and symbols to communicate mathematical ideas; and

g. Demonstrate the interconnectedness of mathematical ideas including making connections across various content areas and real-world contexts;

(3) In the area of mathematical pedagogy have the ability to:

a. Plan and assist others in planning instruction incorporating a variety of strategies including mathematics-specific instructional technologies to build all students' conceptual understanding and procedural proficiency;

b. Analyze and consider research in planning for mathematics instruction;

c. Select and apply instructional techniques that assist in identifying and addressing student misconceptions;

d. Use mathematical content and pedagogical knowledge to select, use, adapt and determine the suitability of mathematics curricula and teaching materials for particular learning goals;

e. Understand students' development in mathematics using holistic, analytical, and diagnostic tools; and

f. Demonstrate developmentally appropriate use of assessments in their practice and train classroom teachers to administer and interpret assessment results; and

(4) In the area of professional knowledge and skills have the ability to:

a. Demonstrate mathematics-focused instructional leadership;

- b. Plan, develop, implement and evaluate mathematics-focused professional development programs;
- c. Evaluate the alignment of state mathematical standards, district curricula, and state and local assessments and recommend appropriate adjustments;
- d. Support teachers in systematically reflecting on and learning from their mathematical practice;
- e. Collaborate with school-based professionals to develop evidence-based interventions for high-and low-achieving students; and
- f. Analyze and interpret mathematics assessment data and communicate results to appropriate and varied audiences.

Appendix I

Rule	Specific State Statute the Rule Implements
Ed 506.09	RSA 21-N:9, II(s); RSA 186:11, X(a)
Ed 506.10	RSA 21-N:9, II(s); RSA 186:11, X(a)
Ed 508.01	RSA 21-N:9, II(s); RSA 186:11, X(a)
Ed 508.02	RSA 21-N:9, II(s); RSA 186:11, X(a)
Ed 508.03	RSA 21-N:9, II(s); RSA 186:11, X(a)
Ed 508.04	RSA 21-N:9, II(s); RSA 186:11, X(a)
Ed 508.05	RSA 21-N:9, II(s); RSA 186:11, X(a)
Ed 508.06	RSA 21-N:9, II(s); RSA 186:11, X(a)
Ed 508.07	RSA 21-N:9, II(s); RSA 186:11, X(a)
Ed 508.08	RSA 21-N:9, II(s); RSA 186:11, X(a)
Ed 508.09	RSA 21-N:9, II(s); RSA 186:11, X(a)
Ed 508.10	RSA 21-N:9, II(s); RSA 186:11, X(a)

Appendix II

Rule	Title	Obtain at:
Ed 508.01(b)(2)a.(i)	The American School Counselor Association (ASCA) <i>Ethical Standards for School Counselors</i> , revised 2016	https://www.schoolcounselor.org/school-counselors/standards Free

Ed 508.01(b)(2)a.(ii)	ASCA 2019 <i>School Counselor Professional Standards & Competencies</i>	https://www.schoolcounselor.org/school-counselors/standards Free
Ed 508.01(b)(2)a.(iii)	ASCA 2014 <i>Mindsets and Behaviors for Student Success: K-12 College- and Career-Readiness Standards for Every Student</i>	https://www.schoolcounselor.org/school-counselors/standards Free
Ed 508.03(b)(2)c.	National Association of Social Workers (NASW) <i>Code of Ethics</i> (2017)	https://www.socialworkers.org/about/ethics/code-of-ethics/code-of-ethics-english Available for purchase for \$6.99
Ed 508.03(b)(2)d.	NASW <i>Standards for School Social Work Services</i> (2012)	https://www.socialworkers.org/LinkClick.aspx?fileticket=1Ze4-9-Os7E%3d&portalid=0 Free
Ed 508.04(b)(1)f.	National Association of School Psychologists <i>Principles for Professional Ethics</i> (2010)	https://www.nasponline.org/standards-and-certification/professional-ethics Free

Readopt with amendment Ed 507.40 and Ed 507.41, effective 10-11-19 (Document #12898, Interim), to read as follows:

Ed 507.40 Special Education Teacher.

(a) To be licensed as a special education teacher the candidate shall have at least a bachelor's degree.

(b) A candidate for licensure as a special education teacher shall have skills, competencies, and knowledge in the following areas:

(1) In the area of foundations, the candidate shall have the ability to:

- a. Describe the philosophies, historical perspectives, theories, models, federal law, state law, and case law related to knowledge and practice in general and special education;
- b. Understand how philosophical and historical perspectives influence professional practice;
- c. Understand the role of families in supporting the development of a student's ability to learn, interact socially, and live as a contributing member of the community;
- d. Understand the functions of schools, school systems, and other agencies and their relationships to general and special education; and
- e. Understand the components of a legally defensible education program;

(2) In the area of development and characteristics of learners, the candidate shall have the ability to:

- a. Describe the similarities and differences in human growth and development of individuals with and without disabilities within and across cognitive, academic, developmental, social, language, sensory, diversity, physical, and emotional and behavioral areas;
- b. Define the characteristics and their respective educational implications of all types of disabilities in federal statutes, federal regulations, and Ed 1100;
- c. Demonstrate knowledge and understanding of diversity, families, communities, gender, and society that influence learning; and
- d. Demonstrate understanding of the influences of environment and co-existing conditions, disabilities, or both, in individuals;

(3) In the area of learning differences, the candidate shall have the ability to:

- a. Understand and utilize the results of individuals' evaluations, assessments, and other information from a variety of sources, including parents and students, to identify academic, developmental, social, emotional, behavioral, functional skills, and post-secondary transition educational needs;

- b. Demonstrate knowledge and understanding of the learning differences, preferences, and needs of students with disabilities including multiple influences of human growth and development in collaboration with team members in the development of individualized educational programs;
- c. Understand how the learning differences, preferences, and needs of students with disabilities affect progress in the general curriculum, extracurricular activities, and other nonacademic areas;
- d. Identify levels of special education services, supplementary aids and services, and support for school personnel to create inclusive instructional opportunities that accommodate diverse learning needs;
- e. Understand and utilize the diverse range of a student's approach to learning and the range of modifications and accommodations that can be used to support learning;
- f. Understand the concept of least restrictive environment and the continuum of educational environments; and
- g. Recognize the relationships among a student's academic, social, emotional, behavioral and functional abilities, attitudes, and interests on instruction, transition planning, and career development;

(4) In the area of learning and social environments, the candidate shall have the ability to:

- a. Incorporate research-based instructional frameworks to promote access, equity, and respect for all students in the general education environments;
- b. Use effective routines, clear expectations and procedures to create safe, caring, respectful, and productive learning environments;
- c. Use a range of preventive and responsive practices documented as effective to support an individual's social, emotional, and educational well-being;
- d. Collaboratively select, administer, analyze, and interpret multiple measures of student's learning, behavior, and the classroom environment to evaluate and adapt classroom settings utilizing interventions and adapting instructions;
- e. Structure learning environments and activities to develop and foster a student's self-awareness, self-management, self-regulation, self-reliance, and self-esteem; and
- f. Provide positive and constructive feedback to guide a student's learning and behavior;

(5) In the area of assessment, the candidate shall have the ability to:

- a. Understand federal law, state law, and administrative rules pertaining to students with disabilities for required assessments and qualified examiners by disability type for the evaluation of students with disabilities as part of assessment related to the special education process;

- b. Understand procedures and timelines for the referral, evaluation, and determination of eligibility for special education and related services;
- c. Understand the range of formal and informal assessments, instruments, and results and their purposes in the special education process for making educational decisions;
- d. Collaboratively select, administer in native language, communication mode, or both, and interpret multiple formal and informal, culturally and linguistically appropriate measures and procedures that are valid and reliable, understand their limitations, and demonstrate the ability to write a formal report;
- e. Systematically use data from a variety of sources to identify the function served by problem behavior to plan, implement, and evaluate behavioral interventions;
- f. Assess, analyze, interpret, and communicate a student's progress towards measurable outcomes, using technology as appropriate, to inform both short- and long-term planning and make ongoing adjustments to instruction; and
- g. Demonstrate an understanding of the manifestation determination process;

(6) In the area of instructional planning and strategies, the candidate shall have the ability to:

- a. Collaboratively plan and participate in best practices in co-teaching to strengthen learning and achievement in the general curriculum for students with disabilities;
- b. Incorporate supports, services, and supplementary aids, including equipment, materials, and assistive technology, across all environments;
- c. Design and implement effective strategies that promote active student engagement, increase student motivation, and enhance self-regulation of a student's learning;
- d. Utilize evidence-based interventions and strategies from multiple approaches validated for specific characteristics of learners based on formative and summative assessment, to create and implement lesson plans for academic, social, and behavioral content that are responsive to diverse backgrounds;
- e. Support the implementation of annual measurable goals, with specially designed instruction, accommodations, and modifications;
- f. Provide specially designed instruction for students with disabilities to increase accuracy and proficiency in the areas of:
 - 1. Reading and writing including phonemic awareness;
 - 2. Phonics;
 - 3. Fluency;
 - 4. Vocabulary;
 - 5. Comprehension; and

6. Written expression;

g. Provide specially designed instruction for students with disabilities to increase accuracy and proficiency in the areas of:

1. Counting and cardinality;
2. Operations and algebraic thinking;
3. Numbers and operations base ten;
4. Numbers and operations with fractions;
5. Measurement and data;
6. Geometry;
7. Ratios and proportional relationships;
8. The number system;
9. Functions; and
10. Statistics, and probability;

h. Identify and explicitly teach executive functioning and social skills;

i. Identify and teach strategies for preparing individuals to live independently, cooperatively, and productively in society;

j. Use individualized strategies to enhance language development and communication skills; and

k. Use progress monitoring from ongoing assessment data to evaluate instruction and student performance, and make responsive adjustments to instruction or individual education plan;

(7) In the area of curricular content and knowledge, the candidate shall have the ability to:

a. Use theories and research that form the basis of curriculum development and instructional practices;

b. Use state, local, or both content standards for planning, teaching, accommodating, and assessing to individualized learning across all settings;

c. Use technology related to curriculum content for planning and managing teaching and learning environments; and

d. Integrate effective social and life skills within the academic curriculum;

(8) In the area of professional practice, the candidate shall have the ability to:

- a. Identify organizations and publications relevant to students with disabilities;
- b. Identify sources of unique services, networks, and organizations for students with disabilities;
- c. Describe the rights and responsibilities of schools, students, families, teachers, and other professionals related to the identification, placement, and services of students with disabilities in accordance with procedural safeguards of Ed 1120 and 34 CFR 300.504, May 2017, as referenced in Appendix II; and
- d. Understand how issues of human diversity can impact families, cultures, and schools, in the delivery of special education services; and

(9) In the area of collaboration, the candidate shall have the ability to:

- a. Utilize communication, group facilitation, and problem-solving strategies in a culturally responsive manner to lead effective meetings and share expertise and knowledge to build team capacity and jointly address students' instructional and behavioral needs;
- b. Collaborate, communicate, and coordinate with families paraprofessionals, and other professionals within the educational setting to assess, plan, and implement effective programs and services that promote progress toward measurable outcomes for individuals with and without disabilities;
- c. Collaborate, communicate, and coordinate with professionals and state and local agencies within the community to identify and access services, resources, and supports to meet the identified needs of individuals with disabilities and their families;
- d. Advocate for and secure appropriate services for students with disabilities; and
- e. Foster respectful and beneficial relationships between families and professionals through the use of meaningful parent engagement;

(c) Each candidate for licensure as a special education teacher for students age 5 up to age 21 shall have the following skills, competencies, and knowledge through a combination of academic and clinical field-based experiences:

- (1) Skill in engaging students with and without disabilities from age 5 up to age 21; and
- (2) Ability to engage in the full range of teaching activities, roles, and responsibilities encountered in the school and community settings of a student with disabilities.

(d) Special education licensure shall qualify a teacher to:

- (1) Teach specially designed instruction to students with disabilities whose placement is along the continuum of alternative educational environments but do not require the specialized knowledge and skills of an educator with a categorical endorsement as defined in Ed 507.42 through Ed 507.47; and

(2) Teach curriculum, aligned to alternative academic standards, in consultation with certified content area teachers, to children with disabilities.

Ed 507.41 Early Childhood Special Education Teacher.

(a) To be licensed as an early childhood special education teacher, the candidate shall have at least a bachelor's degree;

(b) A candidate for licensure as early childhood special education teacher for children from birth through grade 3 shall have skills, competencies, and knowledge in the following areas:

(1) In the area of foundations, the candidate shall have the ability to:

- a. Describe the philosophies, historical perspectives, theories, models, federal law, state law, and case law related to knowledge and practice in early childhood education and special education;
- b. Understand how philosophical and historical perspectives influence professional practice;
- c. Understand the role of families in supporting the development of a young child's ability to learn, interact socially, and live as a contributing member of the community;
- d. Understand the functions of early childhood settings, schools, school systems, community systems, and other agencies and their relationships to early childhood education and special education; and
- e. Understand the components of a legally defensible education program;

(2) In the area of development and characteristics of learners, the candidate shall have the ability to:

- a. Describe the similarities and differences in human growth and development of young children with and without disabilities, within and across cognitive, academic, developmental, social, emotional and behavioral, temperament, language, sensory, diversity, and physical areas;
- b. Define the characteristics and their respective educational implications of all types of disabilities as described in federal statutes, federal regulations, and Ed 1100;
- c. Demonstrate knowledge and understanding diversity, families, communities, gender, and society that influence learning; and
- d. Demonstrate understanding of the influence of environment, co-existing conditions, and disabilities on young children;

(3) In the area of learning differences, the candidate shall have the ability to:

- a. Understand and utilize the results of a young child's evaluations, assessments, and other information from a variety of sources, including parents and young children, to identify academic, developmental, social, emotional, behavioral, and functional skills;
- b. Demonstrate knowledge and understanding of the learning differences, preferences, and needs of young children with disabilities including multiple influences of human growth and development in collaboration with team members in the development of individualized family service programs (IFSP) and individualized education programs (IEP);
- c. Understand how the learning differences, preferences, and needs of young children with disabilities affect progress in preschool activities, the general curriculum, extracurricular activities, and other nonacademic areas;
- d. Identify levels of special education services, supplementary aids and services, and support for school personnel to create inclusive instructional opportunities that accommodate diverse learning needs;
- e. Understand and utilize the diverse range of a young child's approaches to learning and the range of modifications and accommodations that can be used to support learning;
- f. Understand the concept of least restrictive environment and the continuum of educational environments; and
- g. Recognize the relationships among a young child's academic, social, emotional, behavioral and functional abilities, attitudes and interests on the activities of young children and instruction;

(4) In the area of learning and social environments, the candidate shall have the ability to:

- a. Incorporate research based instructional frameworks to promote access, equity, and respect for all children in the early childhood and general education environments;
- b. Use effective routines, clear expectations and procedures to create safe, caring, respectful, and productive learning environments;
- c. Use of range of preventive and responsive practices documented as effective to support individuals' social, emotional, and educational well-being;
- d. Collaboratively select, administer, analyze, and interpret multiple measures of a young child's learning, behavior, and the classroom environment to evaluate and adapt classroom settings utilizing interventions and adapting instruction;
- e. Structure learning environments and activities to develop and foster a young child's self-awareness, self-management, self-regulation, self-reliance, and self-esteem; and
- f. Provide positive and constructive feedback to guide a young child's learning and behavior;

(5) In the area of assessment, the candidate shall have the ability to:

- a. Understand the federal law, state law, and administrative rules pertaining to young children with disabilities, for required assessments and qualified examiners by disability type for the evaluation of young children with disabilities as part of assessment related to the special education process;
- b. Understand early childhood services and supports, birth up to age 3, and the transition process from the IFSP to the IEP by age 3;
- c. Understand procedures and timelines for the referral, evaluation, and determination of eligibility for special education and related services;
- d. Understand and utilize the range of informal assessments, instruments, and results and their purpose in the special education process for making educational decisions;
- e. Collaboratively select, administer in native language, ~~or~~ communication mode, or both, and interpret multiple formal and informal, culturally and linguistically appropriate measures and procedures that are valid and reliable, understand their limitations, and demonstrate the ability to write a formal report;
- f. Systematically use data from a variety of sources to identify the function served by problem behavior to plan, implement, and evaluate behavioral interventions; and
- g. Assess, analyze, interpret, and communicate a young child's progress towards measurable outcomes, using technology as appropriate, to inform both short- and long-term planning and make ongoing adjustments to instruction.

(6) In the area of instructional planning and strategies, the candidate shall have the ability to:

- a. Collaboratively plan and participate in best practices in co-teaching to strengthen learning and achievement in preschool activities, home setting, and the general education curriculum for young children with disabilities;
- b. Incorporate supports, services, and supplementary aids, including equipment, materials, and assistive technology, across all environments;
- c. Design and implement effective strategies that promote active engagement, increase motivation, and enhance self-regulation of a young child's learning;
- d. Utilize evidence-based interventions and strategies from multiple approaches validated for specific characteristics of learners based on formative and summative assessment, to create and implement lesson plans for academic, social, and behavioral content that are responsive to diverse backgrounds;
- e. Support the implementation of annual measurable goals, with specially designed instruction, accommodations, and modifications;
- f. Provide specially designed instruction in order to increase accuracy and proficiency in basic social-emotional, early language/communication, early literacy, early writing, and early numeracy skill development for young children with disabilities;

- g. Identify and explicitly teach foundations of learning, executive functioning, and social skills;
- h. Use individualized strategies to enhance language development and communication skills; and
- i. Use progress monitoring from ongoing assessment data to evaluate instruction and a young child's performance, and make responsive adjustments to instruction, individual family support program, or individual education program;

(7) In the area of curricular content and knowledge, the candidate shall have the ability to:

- a. Use theories and research that form the basis of play-based learning, preschool activities, curriculum development, and instructional practices;
- b. Use state and local content standards or guidelines for planning, teaching, accommodating, and assessing to individualize learning across all settings;
- c. Use technology related to curriculum content for planning and managing teaching and learning environments; and
- d. Integrate effective social and life skills within the early childhood setting;

(8) In the area of professional practice, the candidate shall have the ability to:

- a. Identify organizations and publications relevant to young children with disabilities;
- b. Identify sources of unique services, networks, and organizations for young children with disabilities;
- c. Describe the rights and responsibilities of schools, young children, families, teachers, and other professionals related to the identification, placement, and services of young children with disabilities in accordance with procedural safeguards of Ed 1120 and 34 CFR 300.504, May 2017, as referenced in Appendix II; and
- d. Understand how issues of human diversity can impact families, cultures, and schools in the delivery of special education services; and

(9) In the area of collaboration, the candidate shall have the ability to:

- a. Utilize communication, group facilitation, and problem-solving strategies in a culturally responsive manner to lead effective meetings and share expertise and knowledge to build team capacity and jointly address a young child's instructional and behavioral needs;
- b. Collaborate, communicate, and coordinate with families, paraprofessionals, and other professionals across all educational settings to assess, plan and implement effective programs and services that promote progress toward measurable outcomes for young children with and without disabilities and their families;

c. Collaborate, communicate, and coordinate with professionals and state and local agencies within the community to identify and access services, resources, and supports to meet the identified needs of young children with disabilities and their families;

d. Advocate for and secure appropriate services for young children with disabilities; and

e. Foster respectful and beneficial relationships between families and professionals through the use of meaningful parent engagement;

(c) Each candidate for licensure as an early childhood special education teacher for young children from birth through grade 3 shall have the following skills, competencies, and knowledge through a combination of academic and supervised field-based experiences:

(1) Skill in engaging with young children with and without disabilities from birth through grade 3; and

(2) Ability to engage in the full range of teaching activities, roles, and responsibilities encountered in the school and community settings of a young child with disabilities;

(d) Early childhood special education licensure shall qualify a teacher to provide special education services to young children with disabilities:

(1) For young children from birth through age 3, who receive early supports and services;

(2) For young children from age 3 up to kindergarten, whose placement is in an early childhood program or an early childhood special education program; and

(3) For young children in kindergarten through grade 3, who are eligible to receive special education services and who are able to benefit from general and special education but do not require the specialized knowledge and skills of an educator certified under one or more of the programs defined in Ed 507.42 through Ed 507.47; and

(e) “General education,” as used in (d)(3) above means instruction in a setting that has the inclusion of children with disabilities in proportion to their presence in the general population utilizing the curriculum of the elementary school and taught by a certified elementary or early childhood teacher, with supports from special education personnel, as necessary.

Appendix I

Rule	Specific State Statute the Rule Implements
Ed 507.40	RSA 21-N:9, II(s); RSA 186:11, X(a)
Ed 507.41	RSA 21-N:9, II(s); RSA 186:11, X(a)

Appendix II

Rule	Title	Obtain at
Ed 507.40	34 CFR 300.504, May 2017	https://sites.ed.gov/idea/regs/b/e/300.504 No cost

PART Ed 509 CREDENTIAL RENEWAL AND VALIDITY

Readopt with amendment Ed 509.01, effective 11-14-17 (Document #12418), to read as follows:

Ed 509.01 Recommended Renewal; Process for Educators Currently Employed Under a Local NH Professional Development Master Plan.

(a) Educator licenses shall be renewed every 3 years. School nurse I may renew one time after the first 3 years of the initial license.

(b) In addition to compliance with the requirements of this section, the following shall be required for renewal:

(1) Documentation that the licensed educator has met the requirements of Ed 509.03 and Ed 513.04, or Ed 504.08, 504.09 and 513.07 for school nurse; and

(2) Payment of the renewal fee pursuant to Ed 505.08.

(c) The department shall provide opportunity for electronic submission of the documentation required under Ed 509.03 by the senior educational official.

(d) The senior educational official shall verify that each licensed educator whose license requires renewal has completed professional development as required in Ed 513.04. Verification shall include the name of the licensed educator and the licensed educator's area(s) of endorsement.

(e) The licensed educator shall pay the appropriate fee in a timely manner to the department before the expiration of the educator's license.

(f) Verifications under (c) and (d) above shall be made and the fee under (e) above shall be paid no later than June 30 of the year in which the license is required to be renewed. Late filings shall be treated in accordance with Ed 509.04.

Readopt with amendment Ed 509.02, effective 11-14-17 (Document #12418), to read as follows:

Ed 509.02 Department of Education Renewal; Process for Educators Not Currently Employed Under a Local NH Professional Development Master Plan.

(a) Educator licenses shall be renewed every 3 years. School nurse I may renew one time after the first 3 years of the initial license.

(b) In addition to compliance with the requirements of this section, the following shall be required for renewal:

(1) Documentation that the licensed educator has met the requirements of Ed 509.03 and Ed 513.05, or Ed 504.08, 504.09 and 513.07 for school nurse; and

(2) Payment of the renewal fee pursuant to Ed 505.08.

(c) Any licensed educator not currently employed by an, or teaching in an, educational organization with a valid New Hampshire license may submit documentation electronically to the

department or may apply for a renewal directly by following the application procedures outlined in Ed 505.07(b)(3), Ed 505.08, and Ed 505.09(a)-(d).

(d) Every licensed educator not currently employed by an educational organization under a professional development master plan shall comply with Ed 513.05, Ed 513.06(b), or Ed 513.07(b) as required by the educator's specific license type, and:

- (1) Submit documentation electronically to the department of such compliance; or
- (2) Mail documentation directly to the department documenting such compliance.

(e) Licensees not employed under the jurisdiction of a state approved local master plan for professional development shall submit evidence of approved professional development activities during the 3-year period preceding the application for license renewal as outlined in Ed 513.05, Ed 513.06, and Ed 513.07 as required by the specific license type.

(f) A development activity shall be approved by the department for purposes of (e) above if it includes one or more of the activities listed in Ed 513.02(c)(6).

(g) An educator who holds a valid license and is not employed in education for 3 or more years of service shall submit to the department evidence of satisfactory professional growth listed in Ed 509.03 or Ed 5123.05 as a basis for renewal of his/her license.

(h) The educator shall file all required documentation and pay the renewal fee, as outlined in Ed 505.08, no later than June 30 of the year in which the license is required to be renewed.

Readopt with amendment Ed 509.03 through Ed 509.05, effective 6-15-13 (Document #10362), to read as follows:

Ed 509.03 Renewal Documentation.

(a) The school administrative unit shall submit to the department, for each educator whose license is required to be renewed, verification of professional development activities taking place within the 3 years preceding expiration date of the license consistent with the local master plan for professional development pursuant to Ed 513.

(b) Evidence of approved professional development activities in each subject area or field of specialization as required in accordance with Ed 513.04 or Ed 513.05, as applicable, shall be required for each educator who holds a license in more than one endorsement area.

Ed 509.04 Late Filing.

(a) A renewal application shall be considered a late filing if it is received by the department after July 1 of the year of filing, provided that the department provided notice that a license was due for renewal at least 3 months before July 1 to the licensee.

(b) A late filing shall be accepted by the department if the applicant meets renewal requirements and files:

- (1) A late filing fee of \$50.00; and

- (2) The appropriate filing fee pursuant to Ed 505.08, which fee reflects the actual cost of processing the late filing as authorized under RSA 186:11, X(b).

Ed 509.05 Fees. Payment of renewal fees shall be made in accordance with the rules and fee schedule in Ed 505.08.

Readopt with amendment Ed 512.01, effective 11-9-18 (Document #12661), cited and to read as follows:

PART Ed 512 DENIAL OF CREDENTIAL

Ed 512.01 Denial of Credential.

(a) A credential application shall be denied by the board based on the following grounds:

- (1) Failure to meet the conditions for issuance of the license, endorsement, renewal, or reinstatement;
- (2) The applicant has been charged pending disposition for, or convicted, of any violation or attempted violation of one of the statutes listed in RSA 189:13-a, V, or has been convicted of any felony in any other state, territory, or country;
- (3) The applicant is under investigation for, under suspension for, or has been revoked for a violation of the principles of professional conduct enumerated in Ed 510.01 through Ed 510.04; or
- (4) The applicant is under investigation, under suspension, or has been revoked in any other state, jurisdiction, territory, or country.

(b) An applicant aggrieved by the decision of the department to deny an application may file a petition for reconsideration along with supporting documentation to the director within 20 days after receipt of the denial decision. If the petition for reconsideration is denied, the applicant may appeal the department's decision pursuant to RSA 21-N:11, III, and Ed 200.

Readopt with amendment Ed 513.01 through Ed 513.06, effective 12-21-12 (Document #10245), cited and to read as follows:

PART Ed 513 PROFESSIONAL DEVELOPMENT MASTER PLAN AND RENEWAL

Ed 513.01 Basic Requirement. Each school administrative unit, local school district, or participating nonpublic school shall prepare a 5-year master plan in accordance with requirements of this part.

Ed 513.02 Criteria for State Approval of Local Professional Development Master Plan. The following criteria shall apply to the approval of the master plan:

- (a) Each school administrative unit, local school district, or participating nonpublic school shall file with the department the 5-year master plan required by Ed 513.01;
- (b) The senior educational official shall establish a local professional development committee which shall include representation of licensed educators including teachers, paraeducators, certified

licensed service professionals, and administrators. This committee may include local school board members, parents, or community lay persons;

(c) The local professional development committee shall develop and monitor the master plan according to Ed 513.02(ed) through (g) under the direction of the senior educational official in accordance with local school board policies, state statutes, and state board rules;

(d) The professional development master plan shall include the following:

(1) The process and procedures for establishment of a local professional development committee;

(2) A statement describing the purpose of the master plan that includes but is not limited to:

a. The educational organization's definition of professional development that directs continuous professional learning to increase educator effectiveness and improve results for all students;

b. The role of the plan in increasing educator effectiveness and the relationship between professional learning and the local evaluation system;

c. The role of the plan in increasing student learning and academic achievement;

d. The alignment with local, state, and national professional development standards; and

e. The function and role of the plan for license renewal of all educators;

(3) A statement describing the role and function of the local professional development committee which includes, but is not limited to:

a. How the committee will develop, monitor, implement, evaluate, and propose changes to the plan;

b. How the committee will collaborate with other district committees or teams in developing an overarching framework for professional development including, but not limited to:

1. School improvement committees;

2. Local improvement committees; and

3. Leadership teams; and

c. How the committee shall be involved with individual educator license renewal and how appeals of decisions in the local process will be handled;

(4) A description of the needs assessment process that includes a data collection system and how the school or district makes decisions regarding professional development priorities in order to:

- a. Identify student learning needs;
- b. Determine individual licensed educator goals;
- c. Determine educational organization goals;
- d. Evaluate student learning and licensed educator growth;
- e. Measure the effectiveness of an individual professional development plan; and
- f. Evaluate the effectiveness of the master professional development plan on an on-going basis;

(5) Procedures for recommending licensed educators for licensure renewal that provide evidence of each licensed educator's growth in:

- a. Knowledge of content area(s), subject, or field of specialization including requirements of individual endorsement areas in Ed 506, Ed 507, and Ed 508;
- b. Pedagogy and knowledge of learners and learning as defined in Ed 610.02 and Ed 505.03;
- c. Professional standards as referenced in the local evaluation system; and
- d. Effective instructional practices related to school and district goals that increase student achievement as demonstrated by data such as but not limited to:

- 1. The education improvement and assessment program, RSA 193-C:3, III;
- 2. Portfolios;
- 3. Analysis of student work;
- 4. Standardized and other local assessment instruments; and
- 5. Performance evaluations and portfolios of professional work;

(6) A description of the job-embedded and formal professional development activities that the school or district supports for a comprehensive, sustained, and intensive approach to improving educator effectiveness in raising student achievement such as but not limited to:

- a. Observations;
- b. Independent study;
- c. Study groups and professional learning communities;
- d. Action research;
- e. Educational peer coaching;

- f. Mentoring;
- g. Curriculum, instruction, and assessment development;
- h. Lesson study;
- i. Collegiate or graduate course work; and
- j. Workshops, webinars and professional conferences;

(7) How the activities in (6) shall:

- a. Be facilitated by school principals, school-based professional development coaches, mentors, master teachers, or other teacher leaders;
- b. Engage licensed educators in a continuous cycle of improvement;
- c. Foster collective responsibility for improved student performance;
- d. Support coherent, sustained, and evidenced-based learning strategies; and
- e. Provide coaching or other forms of support to transfer new knowledge and skills to the classroom; and

(8) Describe differentiated processes to address the unique professional learning needs of all credential holders;

(e) The professional development master plan shall comply with state credentialing rules and with federal, state and local laws, rules, and regulations, including the local education improvement plan required in federal grant applications;

(f) The professional development master plan shall include the following processes for developing comprehensive 3-year individual professional development plans that describe how:

- (1) Individual plans are developed and goals are determined;
- (2) Individual plans and goals are approved;
- (3) Individual plans are formatively assessed and summatively evaluated;
- (4) Progress is documented and recorded by the district;
- (5) Activities and documentation from in-progress plans are accepted and transferred into the school or district including how district requirements are pro-rated for the remainder of the 3 year cycle;
- (6) Requirements for endorsements that are added mid-cycle are pro-rated;
- (7) Disputes are handled including an appeals process;

(8) Licensed educators reflect on and provide evidence of the impact of professional learning on their own educational practices and on student learning; and

(9) Recommendations for licensure renewal are determined;

(g) The professional development master plan shall allow individuals licensed educators to document and provide evidence that they have met the requirements for licensure renewal as part of the differentiation of professional learning for the unique needs of licensed educators as follows:

(1) For all of the methods, the professional development master plan shall specify how individual licensed educators reflect on and provide evidence of the impact of professional learning on their own educational practices and on student learning and provide evidence that the professional development addresses:

- a. Increases in educator learning;
- b. Growth in student learning and academic achievement;
- c. Content area knowledge and pedagogy;
- d. The individual educational organization goal(s); and
- e. Professional standards such as those in the local evaluation plan; and

(2) Using any one of the following methods:

- a. The development of a body of evidence that documents job-embedded or formal professional development;
- b. An accumulation of a minimum of 75 continuing education hours with 30 hours for each endorsement area and 45 hours documenting job-embedded or formal professional development; or
- c. A combination of less than 75 continuing education units and evidence that together document job-embedded or formal professional development addressing the school or district improvement goal(s) and content area;

(h) The department shall review each professional development master plan and:

- (1) Approve such plan in writing if it meets the requirements of this section; or
- (2) Confirm in writing that the plan needs modification and a timeline for completing the required revisions;

(j) If the professional development master plan is amended by the school or district, the amendments shall be made in accordance with this section, as confirmed by the department; and

(k) Representatives of the department shall make an on-site visitation, on an as-needed basis as determined by the department, in order to observe whether the local administration of the master plan adheres to the criteria set forth in this section.

Ed 513.03 Individual Professional Development Plan.

(a) Each licensed educator shall develop, in collaboration with a supervisor or the supervisor's designee, an individual plan as follows:

(1) A licensed educator shall file the individual professional development plan with the educational organization for review and approval according to the criteria in (3) below;

(2) The individual professional development plan shall be developed for a 3-year period consistent with the licensed educator's endorsement(s) and incorporate one of the 3 options as defined in the local master plan, referenced in Ed 513.02(g)(2);

(3) The individual professional development plan shall include one or more goals for improving student learning and be developed from:

a. The licensed educator's self-assessment or reflection on competencies referenced in Ed 505.03 and the content area standards referenced in Ed 506, Ed 507, and Ed 508;

b. Analysis of student work;

c. Analysis of student achievement data, if available; and

d. A review of the educational organization master plan needs assessment; and

(4) The individual professional development plan shall outline the licensed educator's growth in the following:

a. Knowledge of content area(s), subject, or field of specialization, including requirements of individual endorsement(s) in Ed 506, Ed 507, and Ed 508;

b. Pedagogy and knowledge of learners and learning as defined in Ed 505.03;

c. Professional standards as referenced in the local evaluation system; and

d. Effective instructional practices related to educational organization goals that increase student achievement.

(b) Each licensed educator whose license expires in a given year shall provide evidence of their individual plan including reflection. The individual plan shall be summatively evaluated as specified in the local professional development master plan.

(c) Professional development completed after nomination or election pursuant to RSA 189:14-a, shall be counted toward the next 3-year licensure renewal cycle.

(d) A licensed educator who is employed under a master plan and who holds a professional certificate that supports his or her current assignment shall develop an individual professional development plan that supports the educator's current assignment.

(e) For multiple endorsement areas, the individual professional development plan shall address each endorsement area.

Ed 513.04 Criteria for ~~Recertification~~ License Renewal of Educators Under the Professional Development Master Plan. The following criteria shall apply for license renewal of educators under the professional development master plan:

(a) The senior educational official shall verify the successful completion of the licensed educator's individual professional development plan, based on one of the options referenced in Ed 513.02(g)(2);

(b) The individual professional development plan shall address the elements described in Ed 513.03(a)(4); and

(c) Upon recommendation for renewal the licensee shall submit the "Recommended for Renewal Application" form, January 2020, as referenced in Ed 505.07(b)(4), in accordance with the application procedures outlined in Ed 505.09(a)-(d), along with the appropriate fee as outlined in Ed 505.08.

Ed 513.05 Criteria For License Renewal of Educators Not Under the Local Professional Development Master Plan.

(a) Licensed educators, excluding those enumerated in Ed 513.06 and Ed 513.07, seeking licensure renewal who are not employed by an educational organization under a professional development master plan, shall submit an individual professional development plan developed for a 3-year period, consistent with the licensed educator's endorsement(s), to the department for review.

(b) The individual professional development plan shall be approved by the department if it meets the following requirements:

(1) An accumulation of a minimum of 75 continuing education hours with 30 hours for each endorsement area and 45 hours aligned with Ed 505.03 or a body of evidence as an alternative to the hours; and

(2) Two or more goals for improving student learning, as developed from the educator's self-assessment or reflection on competencies referenced in Ed 505.03 and the content area standards referenced in Ed 506, Ed 507, and Ed 508.

Ed 513.06 Licensed Paraeducators and Educational Interpreter/Transliterators. Requirements for paraeducators and educational interpreter/transliterators licensed under Ed 504.06, Ed 504.07, and Ed 504.11 shall be as follows:

(a) For those licensed paraeducators who are employed by an agency listed in Ed 513.01, a minimum of 50 continuing education units shall be required in areas determined by the local professional development master plan required by this part; and

(b) For those licensed paraeducators who are not employed by an agency listed in Ed 513.01, a minimum of 50 continuing education units of paraeducator growth shall be required.

Readopt with amendment Ed 513.07, effective 11-14-17 (Document #12418), to read as follows:

Ed 513.07 School Nurse. In addition to the renewal requirements under Ed 504.08 and Ed 504.09, renewal requirements for school nurse shall be as follows:

(a) For those licensed school nurses who are employed by an agency listed in Ed 513.01, a minimum of 45 school nurse related continuing education units shall be required; and

(b) For those licensed school nurses who are not employed by an agency listed in Ed 513.01, a minimum of 45 school nurse related continuing education units shall be required.

Repeal Ed 514.03, effective 9-11-14 (Document #10667), as follows:

~~Ed 514.03 Highly Qualified Teacher.~~

~~— (a) Any individual may apply to the department of education for a statement of eligibility as a highly qualified teacher, who:~~

~~(1) Possesses a valid New Hampshire credential issued by the New Hampshire State Board of Education;~~

~~(2) Is not employed under an approved master plan at the time of application; and~~

~~(3) Has not been deemed highly qualified by a local education agency.~~

~~— (b) The individual shall provide to the department documentation required under 20 USC §7801 (23)(C) to support a claim that the individual is a highly qualified teacher.~~

~~— (c) If the department determines that the individual has met the requirements of 20 USC §7801 (23) (C) then it shall issue a statement of eligibility stating the individual is a highly qualified teacher.~~

~~— (d) A highly qualified teacher statement of eligibility shall be valid for the duration of the credential.~~

~~— (e) On the date that 20 USC §7801 (23) (C) is repealed or deemed ineffective by the United States Department of Education, the department shall cease to accept requests for highly qualified teacher statements of eligibility.~~

Appendix I

Rule	Specific State Statute the Rule Implements
Ed 509.01-509.02	RSA 200:29, RSA 186:11, X(a)
Ed 509.03	RSA 21-N:9, II(s); RSA 186:11, X(a)
Ed 509.04	RSA 21-N:9, II(s); RSA 186:11, X(b)
Ed 509.05	RSA 186:11, X(a)
Ed 512	RSA 186:11, X(a)
Ed 513	RSA 186:11, X(a)
Ed 513.06 introduction and (b)	RSA 21-N:9, II(s)
Ed 513.07	RSA 200:29; RSA 21-N:9, II(s)
Ed 514.03 (repealed)	RSA 21-N:9; RSA 21-N:9, II(s)

Readopt with amendment Ed 507.40 and Ed 507.41, effective 10-11-19 (Document #12898, Interim), to read as follows:

Ed 507.40 Special Education Teacher.

(a) To be licensed as a special education teacher the candidate shall have at least a bachelor's degree.

(b) A candidate for licensure as a special education teacher shall have skills, competencies, and knowledge in the following areas:

(1) In the area of foundations, the candidate shall have the ability to:

- a. Describe the philosophies, historical perspectives, theories, models, federal law, state law, and case law related to knowledge and practice in general and special education;
- b. Understand how philosophical and historical perspectives influence professional practice;
- c. Understand the role of families in supporting the development of a student's ability to learn, interact socially, and live as a contributing member of the community;
- d. Understand the functions of schools, school systems, and other agencies and their relationships to general and special education; and
- e. Understand the components of a legally defensible education program;

(2) In the area of development and characteristics of learners, the candidate shall have the ability to:

- a. Describe the similarities and differences in human growth and development of individuals with and without disabilities within and across cognitive, academic, developmental, social, language, sensory, diversity, physical, and emotional and behavioral areas;
- b. Define the characteristics and their respective educational implications of all types of disabilities in federal statutes, federal regulations, and Ed 1100;
- c. Demonstrate knowledge and understanding of diversity, families, communities, gender, and society that influence learning; and
- d. Demonstrate understanding of the influences of environment and co-existing conditions, disabilities, or both, in individuals;

(3) In the area of learning differences, the candidate shall have the ability to:

- a. Understand and utilize the results of individuals' evaluations, assessments, and other information from a variety of sources, including parents and students, to identify academic, developmental, social, emotional, behavioral, functional skills, and post-secondary transition educational needs;

- b. Demonstrate knowledge and understanding of the learning differences, preferences, and needs of students with disabilities including multiple influences of human growth and development in collaboration with team members in the development of individualized educational programs;
- c. Understand how the learning differences, preferences, and needs of students with disabilities affect progress in the general curriculum, extracurricular activities, and other nonacademic areas;
- d. Identify levels of special education services, supplementary aids and services, and support for school personnel to create inclusive instructional opportunities that accommodate diverse learning needs;
- e. Understand and utilize the diverse range of a student's approach to learning and the range of modifications and accommodations that can be used to support learning;
- f. Understand the concept of least restrictive environment and the continuum of educational environments; and
- g. Recognize the relationships among a student's academic, social, emotional, behavioral and functional abilities, attitudes, and interests on instruction, transition planning, and career development;

(4) In the area of learning and social environments, the candidate shall have the ability to:

- a. Incorporate research-based instructional frameworks to promote access, equity, and respect for all students in the general education environments;
- b. Use effective routines, clear expectations and procedures to create safe, caring, respectful, and productive learning environments;
- c. Use a range of preventive and responsive practices documented as effective to support an individual's social, emotional, and educational well-being;
- d. Collaboratively select, administer, analyze, and interpret multiple measures of student's learning, behavior, and the classroom environment to evaluate and adapt classroom settings utilizing interventions and adapting instructions;
- e. Structure learning environments and activities to develop and foster a student's self-awareness, self-management, self-regulation, self-reliance, and self-esteem; and
- f. Provide positive and constructive feedback to guide a student's learning and behavior;

(5) In the area of assessment, the candidate shall have the ability to:

- a. Understand federal law, state law, and administrative rules pertaining to students with disabilities for required assessments and qualified examiners by disability type for the evaluation of students with disabilities as part of assessment related to the special education process;

- b. Understand procedures and timelines for the referral, evaluation, and determination of eligibility for special education and related services;
- c. Understand the range of formal and informal assessments, instruments, and results and their purposes in the special education process for making educational decisions;
- d. Collaboratively select, administer in native language, communication mode, or both, and interpret multiple formal and informal, culturally and linguistically appropriate measures and procedures that are valid and reliable, understand their limitations, and demonstrate the ability to write a formal report;
- e. Systematically use data from a variety of sources to identify the function served by problem behavior to plan, implement, and evaluate behavioral interventions;
- f. Assess, analyze, interpret, and communicate a student's progress towards measurable outcomes, using technology as appropriate, to inform both short- and long-term planning and make ongoing adjustments to instruction; and
- g. Demonstrate an understanding of the manifestation determination process;

(6) In the area of instructional planning and strategies, the candidate shall have the ability to:

- a. Collaboratively plan and participate in best practices in co-teaching to strengthen learning and achievement in the general curriculum for students with disabilities;
- b. Incorporate supports, services, and supplementary aids, including equipment, materials, and assistive technology, across all environments;
- c. Design and implement effective strategies that promote active student engagement, increase student motivation, and enhance self-regulation of a student's learning;
- d. Utilize evidence-based interventions and strategies from multiple approaches validated for specific characteristics of learners based on formative and summative assessment, to create and implement lesson plans for academic, social, and behavioral content that are responsive to diverse backgrounds;
- e. Support the implementation of annual measurable goals, with specially designed instruction, accommodations, and modifications;
- f. Provide specially designed instruction for students with disabilities to increase accuracy and proficiency in the areas of:
 - 1. Reading and writing including phonemic awareness;
 - 2. Phonics;
 - 3. Fluency;
 - 4. Vocabulary;
 - 5. Comprehension; and

6. Written expression;

g. Provide specially designed instruction for students with disabilities to increase accuracy and proficiency in the areas of:

1. Counting and cardinality;
2. Operations and algebraic thinking;
3. Numbers and operations base ten;
4. Numbers and operations with fractions;
5. Measurement and data;
6. Geometry;
7. Ratios and proportional relationships;
8. The number system;
9. Functions; and
10. Statistics, and probability;

h. Identify and explicitly teach executive functioning and social skills;

i. Identify and teach strategies for preparing individuals to live independently, cooperatively, and productively in society;

j. Use individualized strategies to enhance language development and communication skills; and

k. Use progress monitoring from ongoing assessment data to evaluate instruction and student performance, and make responsive adjustments to instruction or individual education plan;

(7) In the area of curricular content and knowledge, the candidate shall have the ability to:

a. Use theories and research that form the basis of curriculum development and instructional practices;

b. Use state, local, or both content standards for planning, teaching, accommodating, and assessing to individualized learning across all settings;

c. Use technology related to curriculum content for planning and managing teaching and learning environments; and

d. Integrate effective social and life skills within the academic curriculum;

(8) In the area of professional practice, the candidate shall have the ability to:

- a. Identify organizations and publications relevant to students with disabilities;
- b. Identify sources of unique services, networks, and organizations for students with disabilities;
- c. Describe the rights and responsibilities of schools, students, families, teachers, and other professionals related to the identification, placement, and services of students with disabilities in accordance with procedural safeguards of Ed 1120 and 34 CFR 300.504, May 2017, as referenced in Appendix II; and
- d. Understand how issues of human diversity can impact families, cultures, and schools, in the delivery of special education services; and

(9) In the area of collaboration, the candidate shall have the ability to:

- a. Utilize communication, group facilitation, and problem-solving strategies in a culturally responsive manner to lead effective meetings and share expertise and knowledge to build team capacity and jointly address students' instructional and behavioral needs;
- b. Collaborate, communicate, and coordinate with families paraprofessionals, and other professionals within the educational setting to assess, plan, and implement effective programs and services that promote progress toward measurable outcomes for individuals with and without disabilities;
- c. Collaborate, communicate, and coordinate with professionals and state and local agencies within the community to identify and access services, resources, and supports to meet the identified needs of individuals with disabilities and their families;
- d. Advocate for and secure appropriate services for students with disabilities; and
- e. Foster respectful and beneficial relationships between families and professionals through the use of meaningful parent engagement;

(c) Each candidate for licensure as a special education teacher for students age 5 up to age 21 shall have the following skills, competencies, and knowledge through a combination of academic and clinical field-based experiences:

- (1) Skill in engaging students with and without disabilities from age 5 up to age 21; and
- (2) Ability to engage in the full range of teaching activities, roles, and responsibilities encountered in the school and community settings of a student with disabilities.

(d) Special education licensure shall qualify a teacher to:

- (1) Teach specially designed instruction to students with disabilities whose placement is along the continuum of alternative educational environments but do not require the specialized knowledge and skills of an educator with a categorical endorsement as defined in Ed 507.42 through Ed 507.47; and

(2) Teach curriculum, aligned to alternative academic standards, in consultation with certified content area teachers, to children with disabilities.

Ed 507.41 Early Childhood Special Education Teacher.

(a) To be licensed as an early childhood special education teacher, the candidate shall have at least a bachelor's degree;

(b) A candidate for licensure as early childhood special education teacher for children from birth through grade 3 shall have skills, competencies, and knowledge in the following areas:

(1) In the area of foundations, the candidate shall have the ability to:

- a. Describe the philosophies, historical perspectives, theories, models, federal law, state law, and case law related to knowledge and practice in early childhood education and special education;
- b. Understand how philosophical and historical perspectives influence professional practice;
- c. Understand the role of families in supporting the development of a young child's ability to learn, interact socially, and live as a contributing member of the community;
- d. Understand the functions of early childhood settings, schools, school systems, community systems, and other agencies and their relationships to early childhood education and special education; and
- e. Understand the components of a legally defensible education program;

(2) In the area of development and characteristics of learners, the candidate shall have the ability to:

- a. Describe the similarities and differences in human growth and development of young children with and without disabilities, within and across cognitive, academic, developmental, social, emotional and behavioral, temperament, language, sensory, diversity, and physical areas;
- b. Define the characteristics and their respective educational implications of all types of disabilities as described in federal statutes, federal regulations, and Ed 1100;
- c. Demonstrate knowledge and understanding diversity, families, communities, gender, and society that influence learning; and
- d. Demonstrate understanding of the influence of environment, co-existing conditions, and disabilities on young children;

(3) In the area of learning differences, the candidate shall have the ability to:

- a. Understand and utilize the results of a young child's evaluations, assessments, and other information from a variety of sources, including parents and young children, to identify academic, developmental, social, emotional, behavioral, and functional skills;
- b. Demonstrate knowledge and understanding of the learning differences, preferences, and needs of young children with disabilities including multiple influences of human growth and development in collaboration with team members in the development of individualized family service programs (IFSP) and individualized education programs (IEP);
- c. Understand how the learning differences, preferences, and needs of young children with disabilities affect progress in preschool activities, the general curriculum, extracurricular activities, and other nonacademic areas;
- d. Identify levels of special education services, supplementary aids and services, and support for school personnel to create inclusive instructional opportunities that accommodate diverse learning needs;
- e. Understand and utilize the diverse range of a young child's approaches to learning and the range of modifications and accommodations that can be used to support learning;
- f. Understand the concept of least restrictive environment and the continuum of educational environments; and
- g. Recognize the relationships among a young child's academic, social, emotional, behavioral and functional abilities, attitudes and interests on the activities of young children and instruction;

(4) In the area of learning and social environments, the candidate shall have the ability to:

- a. Incorporate research based instructional frameworks to promote access, equity, and respect for all children in the early childhood and general education environments;
- b. Use effective routines, clear expectations and procedures to create safe, caring, respectful, and productive learning environments;
- c. Use of range of preventive and responsive practices documented as effective to support individuals' social, emotional, and educational well-being;
- d. Collaboratively select, administer, analyze, and interpret multiple measures of a young child's learning, behavior, and the classroom environment to evaluate and adapt classroom settings utilizing interventions and adapting instruction;
- e. Structure learning environments and activities to develop and foster a young child's self-awareness, self-management, self-regulation, self-reliance, and self-esteem; and
- f. Provide positive and constructive feedback to guide a young child's learning and behavior;

(5) In the area of assessment, the candidate shall have the ability to:

- a. Understand the federal law, state law, and administrative rules pertaining to young children with disabilities, for required assessments and qualified examiners by disability type for the evaluation of young children with disabilities as part of assessment related to the special education process;
- b. Understand early childhood services and supports, birth up to age 3, and the transition process from the IFSP to the IEP by age 3;
- c. Understand procedures and timelines for the referral, evaluation, and determination of eligibility for special education and related services;
- d. Understand and utilize the range of informal assessments, instruments, and results and their purpose in the special education process for making educational decisions;
- e. Collaboratively select, administer in native language, ~~or~~ communication mode, or both, and interpret multiple formal and informal, culturally and linguistically appropriate measures and procedures that are valid and reliable, understand their limitations, and demonstrate the ability to write a formal report;
- f. Systematically use data from a variety of sources to identify the function served by problem behavior to plan, implement, and evaluate behavioral interventions; and
- g. Assess, analyze, interpret, and communicate a young child's progress towards measurable outcomes, using technology as appropriate, to inform both short- and long-term planning and make ongoing adjustments to instruction.

(6) In the area of instructional planning and strategies, the candidate shall have the ability to:

- a. Collaboratively plan and participate in best practices in co-teaching to strengthen learning and achievement in preschool activities, home setting, and the general education curriculum for young children with disabilities;
- b. Incorporate supports, services, and supplementary aids, including equipment, materials, and assistive technology, across all environments;
- c. Design and implement effective strategies that promote active engagement, increase motivation, and enhance self-regulation of a young child's learning;
- d. Utilize evidence-based interventions and strategies from multiple approaches validated for specific characteristics of learners based on formative and summative assessment, to create and implement lesson plans for academic, social, and behavioral content that are responsive to diverse backgrounds;
- e. Support the implementation of annual measurable goals, with specially designed instruction, accommodations, and modifications;
- f. Provide specially designed instruction in order to increase accuracy and proficiency in basic social-emotional, early language/communication, early literacy, early writing, and early numeracy skill development for young children with disabilities;

- g. Identify and explicitly teach foundations of learning, executive functioning, and social skills;
- h. Use individualized strategies to enhance language development and communication skills; and
- i. Use progress monitoring from ongoing assessment data to evaluate instruction and a young child's performance, and make responsive adjustments to instruction, individual family support program, or individual education program;

(7) In the area of curricular content and knowledge, the candidate shall have the ability to:

- a. Use theories and research that form the basis of play-based learning, preschool activities, curriculum development, and instructional practices;
- b. Use state and local content standards or guidelines for planning, teaching, accommodating, and assessing to individualize learning across all settings;
- c. Use technology related to curriculum content for planning and managing teaching and learning environments; and
- d. Integrate effective social and life skills within the early childhood setting;

(8) In the area of professional practice, the candidate shall have the ability to:

- a. Identify organizations and publications relevant to young children with disabilities;
- b. Identify sources of unique services, networks, and organizations for young children with disabilities;
- c. Describe the rights and responsibilities of schools, young children, families, teachers, and other professionals related to the identification, placement, and services of young children with disabilities in accordance with procedural safeguards of Ed 1120 and 34 CFR 300.504, May 2017, as referenced in Appendix II; and
- d. Understand how issues of human diversity can impact families, cultures, and schools in the delivery of special education services; and

(9) In the area of collaboration, the candidate shall have the ability to:

- a. Utilize communication, group facilitation, and problem-solving strategies in a culturally responsive manner to lead effective meetings and share expertise and knowledge to build team capacity and jointly address a young child's instructional and behavioral needs;
- b. Collaborate, communicate, and coordinate with families, paraprofessionals, and other professionals across all educational settings to assess, plan and implement effective programs and services that promote progress toward measurable outcomes for young children with and without disabilities and their families;

c. Collaborate, communicate, and coordinate with professionals and state and local agencies within the community to identify and access services, resources, and supports to meet the identified needs of young children with disabilities and their families;

d. Advocate for and secure appropriate services for young children with disabilities; and

e. Foster respectful and beneficial relationships between families and professionals through the use of meaningful parent engagement;

(c) Each candidate for licensure as an early childhood special education teacher for young children from birth through grade 3 shall have the following skills, competencies, and knowledge through a combination of academic and supervised field-based experiences:

(1) Skill in engaging with young children with and without disabilities from birth through grade 3; and

(2) Ability to engage in the full range of teaching activities, roles, and responsibilities encountered in the school and community settings of a young child with disabilities;

(d) Early childhood special education licensure shall qualify a teacher to provide special education services to young children with disabilities:

(1) For young children from birth through age 3, who receive early supports and services;

(2) For young children from age 3 up to kindergarten, whose placement is in an early childhood program or an early childhood special education program; and

(3) For young children in kindergarten through grade 3, who are eligible to receive special education services and who are able to benefit from general and special education but do not require the specialized knowledge and skills of an educator certified under one or more of the programs defined in Ed 507.42 through Ed 507.47; and

(e) “General education,” as used in (d)(3) above means instruction in a setting that has the inclusion of children with disabilities in proportion to their presence in the general population utilizing the curriculum of the elementary school and taught by a certified elementary or early childhood teacher, with supports from special education personnel, as necessary.

Appendix I

Rule	Specific State Statute the Rule Implements
Ed 507.40	RSA 21-N:9, II(s); RSA 186:11, X(a)
Ed 507.41	RSA 21-N:9, II(s); RSA 186:11, X(a)

Appendix II

Rule	Title	Obtain at
Ed 507.40	34 CFR 300.504, May 2017	https://sites.ed.gov/idea/regs/b/e/300.504 No cost

POSTPONEMENT AND RESCHEDULING OF A RULEMAKING HEARING

Notice Number 2020-58Rule Number Ed 306.14 and Ed 306.18(a)(7)

1. Agency Name & Address:

**State Board of Education
c/o NH Department of Education
101 Pleasant Street
Concord, NH 03301**

2. RSA Authority: RSA 21-N:9, I

3. Federal Authority: _____

4. Type of Action:

Adoption _____

Amendment X

Repeal _____

Readoption _____

Readoption w/amendment X5. Short Title: **Remote Instruction: Basic Instructional Standards and School Year**

6. In accordance with RSA 541-A:11, IV, a rulemaking hearing has been postponed for this proposed rule for which notice appeared in the Rulemaking Register on June 25, 2020 under Notice Number 2020-58. The public hearing has therefore been rescheduled for:

Date and Time: **September 10, 2020 @ 10:00 a.m.**Place: **In-Person: 101 Pleasant Street, Concord, NH 03301 Room 100f**

In order for the agency to ensure compliance with social distancing recommendations due to the COVID-19 pandemic, members of the public wishing to testify on the rule in person must complete the following steps:

1. Email amanda.phelps@doe.nh.gov;

2. In the subject line type the following “WISHING TO TESTIFY IN PERSON ON Ed 306.14 and Ed 306.18(a)(7)”; and

3. In the body of the email type the following: Your name, the organization you may be representing, your town of residence, your phone number.

If you have written comment in addition to oral testimony, please submit it in the email as a word or pdf attachment.

Continued on next page:

Telephonic: (800) 356-8278 Pin: 125563 State name and affiliation when prompted

Members of the public wishing to testify over the phone must complete the following steps:

1. Email amanda.phelps@doe.nh.gov;
 2. In the subject line type the following “WISHING TO TESTIFY OVER THE PHONE ON Ed 306.14 and Ed 306.18(a)(7)”;
 3. In the body of the email type the following: Your name, the organization you may be representing, your town of residence, your phone number.
- If you have written comment in addition to oral testimony, please submit it in the email as a Word or pdf attachment.

Written Testimony

Members of the public wishing only to submit written testimony at any time, either prior to the hearing, or up to August 20, 2020, must complete the following steps 1 or 2:

1. (a) Email amanda.phelps@doe.nh.gov;
 - (b) In the subject line type the following “SUBMITTING TESTIMONY ON Ed 306.14 and Ed 306.18(a)(7)”;
 - (c) In the body of the email type the following: Your name, the organization you may be representing, your town of residence, your phone number; OR
2. Submit testimony in writing via mail or fax to the contact information referenced in #7 above.

If any member of the public has any issue with access to the meeting, please email, or call Amanda Phelps at the contact information referenced in item #8 below.

7. New deadline for submission of materials in writing or, if practicable for the agency, in the electronic format specified: **September 17, 2020**

☒ Fax

☒ E-mail

☐ Other format (specify):

8. Contact person for copies and questions including requests to accommodate persons with disabilities:

Name: **Amanda Phelps**

Title: **Administrative Rules
Coordinator**

Address: **Department of Education
101 Pleasant Street
Concord, NH 03301**

Phone #: **603-931-9133**

Fax#: **603-271-1953**

E-mail: **Amanda.phelps@doe.nh.gov**

TTY/TDD Access: Relay NH 1-800-735-
2964 or dial 711 (in NH)

Amend Ed 306.18(a)(7), effective 3-27-14 (Document #10047), cited and to read as follows:

Ed 306.18 School Year.

(a) Pursuant to RSA 189:1 and RSA 189:24, each school district shall maintain a school year as provided below:

~~(7) A school district **Instruction** may submit a plan to the commissioner that will allow schools to conduct instruction *be offered* remotely for up to 5 days per year when the school has been closed due to inclement weather or other emergency. The plan shall include procedures for participation by all students. Academic work shall be equivalent in effort and rigor to typical classroom work. There shall be an assessment of all student work for the day. At least 80 percent of students shall participate for the day to count as a school day.~~

Readopt with amendment, Ed 306.14, effective 8-9-19 (Document #12845), to read as follows:

Ed 306.14 Basic Instructional Standards.

(a) The local school board shall require that each school has an instructional program which includes the following:

- (1) A policy on homework, including its relationship to the grading system;
- (2) An organized plan for recording student progress in meeting district and graduation competencies in alignment with RSA 193-C:3;
- (3) A policy for promoting students from one learning level to another based on achievement of district competencies in alignment with RSA 193-C:3;
- (4) Instructional materials and resources matched to the appropriate skill levels of students;
- (5) A policy that outlines how digital literacy will be integrated in a developmentally appropriate manner across grades 1-12 instruction, and how the district or graduation competencies associated with digital literacy will be assessed either alone or in combination with other district or graduation competencies and assessments;
- (6) A policy outlining how students will demonstrate achievement of district and graduation competencies including the awarding of credit for required subjects and open electives;
- (7) A policy encouraging students to pursue and demonstrate advanced course work, including advanced placement courses in high school, dual enrollment in college courses; ~~and~~
- (8) A policy encouraging students to have a plan for summer activities that support student learning; *and*
- (9) *Remote instruction for all students, when necessary, which shall include:*
 - a. Academic work equivalent in effort and rigor to typical classroom work;*
 - b. Accessibility by and inclusion for both individual and school-wide uses; and*

c. Assessment of all student work completed during remote instruction.

(b) The instructional program shall enable students to demonstrate achievement of graduation competencies in alignment with RSA 193-C:3.



Frank Edelblut
Commissioner

Christine M. Brennan
Deputy Commissioner

STATE OF NEW HAMPSHIRE
DEPARTMENT OF EDUCATION
Division of Education Analytics and Resources
Office of Nonpublic Schools
101 Pleasant Street
Concord, NH 03301
TEL. (603) 271-2831

September 2020
State Board of Education Meeting
Commissioner's Nonpublic School Approval Designation Report
Executive Summary

A. Action Needed

A vote is needed to accept and approve the recommended designations for a NH non-public school(s). **One new school seeks an initial attendance approval status to operate. A second school seeks approval to add grade levels to the existing programs offered.**

B. Rationale for Action

The Code of Administrative Rules Ed 401.02 provide for the following school approval categories, one of which shall be recommended for each school in the Designation Report to the State Board:

Approved (3 years or 5 years) – a school seeking approval meets all of the applicable requirements of Ed 403 or 404, as applicable.

Preliminary Approved (1 year) – a school does not meet some of the standards of Ed 403 or 404 prior to opening but can adequately meet the needs of its students.

Conditionally Approved (1 year) – a school seeking continued approval does not meet some of the standards of Ed 403 or 404 and has identified deficiencies and a timetable for corrections.

Denied Approval – a school has failed to meet the requirements of Ed 403 or Ed 404 and has failed to be approved after 3 years of being conditionally approved.

Delay in Full Compliance – a school recommended for denied approval shall have 10 days to make a request for a grievance hearing before the Nonpublic School Advisory Council Committee in accordance with Ed 406.

C. Effects of this Action

Approval of this Report allows **one new school to operate as nonpublic school with an attendance approval status for a period of 3 years, and one existing school to provide new programs as part of new grade levels.**

D. Possible Motion

I move that the State Board accept and approve the following school for initial attendance approval status for the period of **September 10, 2020 through June 30, 2023: Our Lady of Mercy Academy.**

I move that the State Board accept and approve the following school to provide additional grade levels for the period of [September 10, 2020 through June 30, 2023: Acton Academy New Hampshire.](#)

Nonpublic School Approvals
Designation Report List

Town	School Name	Approval Type	Current Expiration	New Expiration
Keene	Our Lady of Mercy Academy	AA	N/A	6/30/2023

NONPUBLIC SCHOOLS CHECKLIST - REQUEST TO CHANGE GRADE LEVELS OFFERED

Reviewed By: Shireen Meskoob

School Name: Acton Academy New Hampshire	Current Approval Type: Attendance Approval (AA)
Principal Address: 791 N. Main St, Laconia, NH 03246	
Head of School: Mary MacIntosh	Email: actonacademynh@gmail.com Phone: 603-609-0535
Authorized to Represent School: Same	Email: Phone Number:
Date Application Received: 8-23-2020	Website: www.ActonAcademyNH.org
Requested Effective Date: 9-10-2020	
Current Grade Levels Offered: K-6	Requested New Grade(s): 7-8
Anticipated Total Enrollment: 24	Anticipated Enrollment in New Grade(s): 2

Approved	Required Documents	Date Received	Comments
<input checked="" type="checkbox"/>	Academic content	8-23-2020	Courses include Ancient Civilizations, Politics, Islam and the Middle East, Negotiations, Behavioral Economics, Algebra, Chemistry, Medical Biology, Classic Physics, Geometry, Robotics, Statistics and Probability, Apprenticeships, Socratic Discussion.
<input checked="" type="checkbox"/>	Assessment processes and promotion requirements	8-23-2020	Processes used are exhibitions, speeches, lab experiments, independent research, film analysis, discussions, timeline productions, role play, portfolios, and case studies. Promotion requirements take the form of rubric-based reports, standardized tests, and peer review.
<input checked="" type="checkbox"/>	Application Complete and Reviewed by DOE	8-23-2020	The Office of Nonpublic Schools (ONPS) determines that Acton Academy New Hampshire complies with the minimum requirements set forth in Ed 400 relative to obtaining approval to change the grade levels that it offers.

NONPUBLIC SCHOOLS CHECKLIST FOR INITIAL APPLICATIONS

Reviewed By: Shireen Meskoob

School Name: Our Lady of Mercy Academy	Phone Number: 603-352-2720	Application Type: AA
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About the School: Our Lady of Mercy Academy offers a co-educational college preparatory program in a Christian atmosphere. The school is a Catholic school “welcoming families of all faiths from the Monadnock area”. Their faith-based school program promotes “high academic standards and positive self-esteem, encourages personal responsibility and public service, and instills a sense of community.” Our Lady of Mercy Academy is rooted in the education provided by St. Joseph Regional Catholic School, a K-8 nonpublic schools that currently enrolls 177 students. These students would be able to continue their high school education with their same community. This is why the school may be referred to as *Our Lady of Mercy Academy at Saint Joseph Regional School*.

Principal Address: 161 Main Street, Keene, NH 03431

Mailing Address: Same

Head of School: Christopher Smith, Principal Email: csmith@stjosephkeene.org

Authorized to Represent School: Anthony Toscano, Operations Manager Email: atoscano@josephkeene.org

Date Application Received: 6/10/2020

Grade Levels: 9-12, Ages 14-18 Website: <https://stjosepheagles.org/>

Multi-Grade Classrooms: Yes ☐ No ☒ Co-Educational: Yes ☒ No ☐

Boarding School: Yes ☐ No ☒ ☐ For Profit ☒ Nonprofit

Anticipated Enrollment Total: 17 *DOE Approved Provider of SPED Program: Yes ☐ No ☒

Approved	Required Documents	Date Received	Comments
<input checked="" type="checkbox"/>	Accrediting Agency	6/10/2020	Not applicable.
<input checked="" type="checkbox"/>	School Calendar	6/10/2020	Submitted.
<input checked="" type="checkbox"/>	School Hours Survey	6/17/2020	Submitted.
<input checked="" type="checkbox"/>	School Purpose/Philosophy	6/10/2020	Submitted.
<input checked="" type="checkbox"/>	Curriculum/Objectives	6/10/2020	Submitted.
<input checked="" type="checkbox"/>	Assessment Criteria	6/10/2020	Submitted.
<input checked="" type="checkbox"/>	School/Community Relationship	6/10/2020	Submitted.
<input checked="" type="checkbox"/>	Programs Offered: e.g. Art, Music, Computer, PE, World Languages	6/10/2020	Submitted.
<input checked="" type="checkbox"/>	Services Offered: e.g. Health, Transportation, Food, Library	6/10/2020	Submitted.
<input checked="" type="checkbox"/>	Automated External Defibrillation (AED)	6/10/2020	Will comply.
<input checked="" type="checkbox"/>	Graduation Requirements	6/10/2020	Submitted.
<input checked="" type="checkbox"/>	Student Handbook	6/10/2020	Submitted.
<input checked="" type="checkbox"/>	Grievance Policy i.e. Bullying, Restraint, Teacher Misconduct, Tuition Refund	7/20/2020	Submitted.
<input checked="" type="checkbox"/>	Student Records Location Prior and Upon School Closing	6/10/2020	Submitted.

TO BE COMPLETED BY DOE UPON RECEIPT OF APPLICATION

<input checked="" type="checkbox"/>	Summer School/Programs	6/10/2020	Submitted.
<input checked="" type="checkbox"/>	US-NH History, RSA 189:11	6/22/2020	Will comply.
<input checked="" type="checkbox"/>	English as Primary Language, RSA 189:19	6/10/2020	Will comply.
<input checked="" type="checkbox"/>	Organization Chart	6/23/2020	Submitted.
<input checked="" type="checkbox"/>	Professional Development	6/10/2020	Submitted.
<input checked="" type="checkbox"/>	Criminal Records Check	6/10/2020	Planned.
<input checked="" type="checkbox"/>	Board Members List/Responsibilities	6/10/2020	Submitted.
<input checked="" type="checkbox"/>	Fire and Life Safety Inspection Report	Confirmed 6/10/2020	Will submit after the school opens and before 12/15/2020 per state regulations.
<input type="checkbox"/>	Health Inspection Report	Completion/ clarification anticipated on 9/3/2020	Missing are responses for the section on Environmental Hazards. It was indicated to the DOE that these items fall under the purview of Keene Fire. Completion/clarification of these items is forthcoming, anticipated on 9/3/2020.
<input checked="" type="checkbox"/>	Zoning Approval	8/25/2020	Submitted.
<input type="checkbox"/>	Occupancy Permit	Completion/ clarification anticipated by 9/10/2020	A temporary occupancy permit, effective through 9/13/2020, was submitted. The conditions stated allows occupancy for teachers and staff only.
<input checked="" type="checkbox"/>	Secretary of State Certificate of Good Standing	7/2/2020	Submitted.
<input checked="" type="checkbox"/>	Federal Tax Exempt Status	6/10/2020	Exempt.
<input checked="" type="checkbox"/>	Tentative First Year Budget	7/23/2020	Submitted.
<input checked="" type="checkbox"/>	Liability Insurance	7/23/2020	Submitted.
<input checked="" type="checkbox"/>	Authority to Sign Financial Documents	6/22/2020	Submitted.
<input checked="" type="checkbox"/>	Intent to conduct an Independent Audit of School Finances	6/17/2020	Yes.
<input checked="" type="checkbox"/>	Receive Funds from Local District	6/22/2020	Yes.
<input checked="" type="checkbox"/>	United States and NH State Flag Displayed, RSA 189:17	6/10/2020	Will comply.
<input checked="" type="checkbox"/>	Physicals, Immunization, RSA 141-C:20a	6/10/2020	Will comply.
<input checked="" type="checkbox"/>	Physical Exam of Pupils, RSA 200:32	6/10/2020	Not applicable.
<input checked="" type="checkbox"/>	Intent to Upload Emergency Operations, RSA 189:64	6/19/2020	Yes.
<input type="checkbox"/>	Visit by the Department of Education	Scheduled for 9/3/2020	A visit is scheduled with Marj Schoonmaker of the DOE School Safety and Facility Management Bureau on 9/3/2020.
<input checked="" type="checkbox"/>	Application Reviewed by DOE	8/31/2020	In anticipation of a successful site visit and completion/clarification of the health inspection and occupancy permit, the Office of Nonpublic Schools determines that Our Lady of Mercy Academy complies with the minimum requirements set forth in Ed 403.01

TO BE COMPLETED BY DOE UPON RECEIPT OF APPLICATION



New Hampshire

Department of Education

			relative to obtaining an initial approval for attendance purposes only.
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STATE OF NEW HAMPSHIRE
DEPARTMENT OF EDUCATION
101 Pleasant Street
Concord, NH 03301
TEL. (603) 271-3495
FAX (603) 271-1953

NONPUBLIC SCHOOL APPLICATION FOR INITIAL APPROVAL
(Please Print)

Today's Date: 6/3/2020

1. Name of School: Our Lady of Mary Academy at Saint Joseph Regional School
2. Street Address: 161 Main St. Keene, NH 03431
3. Mailing Address: 161 Main St. Keene, NH 03431
4. Name/title of the director or the person authorized to represent the school: Christopher Smith / Principal Anthony Toscano / Dir. of Finance
5. Telephone Number: 603 352-2720 Fax Number : 603 358-5465
Email: atoscano@stjosephkeene.org -Website: www.stjosephkeene.org
6. Approval is requested for Grade 9 to Grade 12 and Age 14 to Age 18
Please provide the school's current number of students in the table below.
Include the number of infants and toddlers in the 1-T column.

NOTE: The NH Department of Education ONLY approves grades K-12 per RSA 186:6-a.

GRADES	1-T	Pre	K	1	2	3	4	5	6	7	8	9	10	11	12	Total
Non Special Education Students		21	13	17	13	25	18	12	25	21	12					
International Students																
Special Education Students																
Home Education Students																
Total Number of Students																

7. Will the school combine different grades in one classroom? YES ___ NO ✓
8. Will this school be co-educational? YES ✓ NO ___ If not, which gender will be admitted?

9. Will this school provide room and board for students? YES _____ NO ✓

10. Will this school year offer summer school or summer programs? YES _____ NO ✓
If yes, please attach a full description.

CALENDAR

11. Please complete and submit the attached School Schedule Survey.

FACILITIES

12. Acceptable fire safety and health inspection reports for all school facilities used by students must be submitted before a school can receive an approved designation. (Please read the attached forms.) Please attach a list of all school buildings including the name (if any) and location (if offsite) of all school buildings. Please include modular buildings. In Process

13. If the school facilities are not connected to the municipal water system, a letter of approval or exemption from the NH Division of Environmental Services (DES) must be submitted. N/A

14. If the school facilities are not connected to the municipal wastewater system, submit proof that septic tank is pumped regularly. N/A

15. The attached Zoning Verification form must be completed and submitted with this application. In Process

PERSONNEL

16. Does the school presently have a governing board? If yes, please attach a list of all governing board members and their addresses. If no, please submit a list when board is complete. No

17. Please attach a list of all staff and teachers and a brief resume or curriculum vitae for each to include: formal education, professional experience and special life experiences qualifying that staff member to carry out assigned responsibilities. If teachers and staff have not yet been hired, please submit this information before the start of classes. ✓

18. If personnel have been hired, please attach an organizational chart or list with the names of staff, their titles and their supervisors. ✓

19. Will you require criminal record checks for teachers and staff? (Highly Recommended) Yes

20. Please attach your plan to provide professional development opportunities to staff and teachers.

We have a professional Development Coordinator and the Diocese provides 30 hours/year in Development to all.

FINANCES

21. Please submit a tentative first year budget indicating anticipated expenses, income and sources of income. Anticipated expenses shall include, but not be limited to: facility acquisition, maintenance and operations, insurance, salaries and benefits, equipment and supplies. ✓

22. Will this school be incorporated in New Hampshire? If yes, what is or what will be the name of the corporation?

Is this school incorporated in another state? If yes, which state?

Please provide the school's current Certificate of Good Standing or other documentation showing that the school is currently registered with the NH Secretary of State's Office. (Information at <http://www.sos.nh.gov/corporate/index.html> or 603-271-3244.)

23. Will this school apply for federal tax exempt status? If yes, submit proof of status when available. ✓

24. Who will have the authority to sign payment checks and other financial documents for the school? Christopher Smith (Principal)
Will these people be bonded? NO

25. Will an independent audit of school finances be conducted each year?
Yes / Diocese

EDUCATIONAL PROGRAM

26. Please submit the following information:

Course of Studies & Handbook

- a) The specific educational purpose(s) and objectives to be served by this school;
- b) The philosophic or religious traditions influencing this school's programs, if any;
- c) The procedure to evaluate the achievement of school's stated educational purpose(s) and objectives;
- d) A description of the school's planned procedure to evaluate and report students' overall progress;
- e) A description of the expected relationship between this school and the local community; and
- f) The school's curriculum or list of objectives for each grade or list of course descriptions for each grade.

27. If this school will include Grade 12, provide a list of the courses and credits needed to receive a high school diploma from this school.

28. In which grade(s) will this school provide instruction in the history, government and constitutions of the United States and New Hampshire, including the organization and operation of New Hampshire municipal, county and state government? Yes
(Per RSA 189:11, such instruction shall begin no later than the opening of the 8th grade and shall continue in high school as an identifiable component of a year's course in the history and government of the United States and New Hampshire.)

29. Will English be the primary language used in this school? (RSA 189:19) Yes

30. Which of the programs will be offered at this school?

PROGRAMS OFFERED	YES	NO
Art	X	
Computer Technology	X	
Music	X	
Physical Education Classes	X	
Vocational or Career Technical Education	X	
World Languages	X	

31. Please submit a copy of the school's student handbook or similar guidelines to be provided to students and parents. ✓

32. Please submit a copy of the school's grievance policy or procedures to address complaints concerning bullying, teacher misconduct and payment of tuition when a student leaves the school. ✓

33. Will this school submit to the NH Department of Education on or before October 15th each year, the school's average daily membership in attendance, fall enrollment and teacher staff numbers in accordance with RSA 189:28?

yes

34. Please indicate:

- 1) How the school will keep student records secure and safe; and
- 2) Where student records will be stored if the school closes.

(We recommend records be sent to the local school administrative unit or the Department of Education.)

LOCAL SAU as well as electronic via cloud storage.

35. Will your school require students to be immunized prior to enrollment and maintain the results in the students' records as required by RSA 141-C:20a?

NO

36. Please submit a brief statement identifying those practices, if any, adopted by the school in carrying out the intent of RSA 200:32, Physical Exam of Pupils, requiring a complete physical examination by a licensed physician, physician's assistant or advanced practice registered nurse of each child upon entry into school for the first time.

N/A

37. Please submit a brief statement identifying those practices, if any, adopted by the school in carrying out the intent of RSA 189:10, Health Studies, requiring health and physical education be taught especially as they relate to the effects of alcohol and other drugs, child abuse, HIV/AIDS and STDs on the human system.

38. Please provide a brief description below for those services which will be provided.

Services

Nurse or other medical support: yes / First Aid, Triage & transport if necessary

Transportation services including to and from school, field trips and extracurricular activities: yes only with written permission, only on field trips

Food Services:	No
Library:	Yes via Keene State College

39. Will your school develop an Emergency Response Plan as required by RSA 189:64 (attached)? Yes

40. If your school will have an Automated External Defibrillation (AED), it must be registered as required by RSA 153-A:32. Yes

41. Will your school display a United States flag no less than 5 feet in length outdoors as required by RSA 189:17? Yes

42. Is your school approved by any of these recognized agencies?

- a) New England Association of Schools and Colleges (NEASC) No
- b) Association of Christian Schools International (ACSI) No
- c) American Association of Christian Schools (AACCS) No
- d) NH Department of Education Bureau of Special Education No

"I verify the information submitted on this form and in other submitted documents is true and accurate."

Name of Principal or Authorized Representative (Print) C. B. [Signature]

Name of Director or Authorized Representative (Signature) Amey m. 2

Today's Date: 6/3/2020

Please send the completed nonpublic school application and related documents to the:

Division of Educator and Analytic Resources
NH Department of Education
101 Pleasant Street
Concord, NH 03301-3860

New Hampshire laws and administrative rules, as well as contact information for various state departments, can be found at <https://www.nh.gov/glance/laws-rules.htm>.

**NH Department of Education
Bureau of Educational Opportunities
101 Pleasant Street
Concord, NH 03301**

Initial Nonpublic School Schedule Survey

School Year: 20 20 to 20 21
(Please Print)

Name of School: Our Lady of Mercy Academy at Saint Joseph Regional School

School Address: 161 Main St. Keene, NH 03431 / 92 Wilson St. Keene, NH 03431

Which grades are offered at this school? Pre-K through 12

Number of full days (6 hours or more) this school will be in session: 175

Number of partial days (less than 6 hours) this school will be in session: 4

List the partial days to be scheduled, if any:

11/10 Teacher Conferences 4/1 Holy Thursday
2/5 Grandparents Day 6/16 Last Day of School

List the vacation weeks and other holidays when school will not be in session:

9/7 Labor Day 11/11 Veteran's Day 12/21-1/1 Holidays 1/18 MLK 4/2 Good Friday
10/12 Columbus Day 11/25-11/27 Thanksgiving 2/22-2/26 Feb break 3/12 workshops 4/24-4/30 Spring Break

First scheduled day of classes: 8/31/20 Last scheduled day of classes: 6/16/21

5/31 Memorial Day

Last day of grade 12 classes, if applicable: N/A

On full days, what time will school start and end? How many minutes will students attend?

Grade(s)	Start	End	Total Day Minutes
Kindergarten	8:45 AM	2:50 PM	275 Educational
Elementary (1-6)	8:45 AM	2:50 PM	335 Educational
Middle/Jr High School (7-8)	8:30 AM	2:50 PM	350 Educational
High School (9-12)	8:10 AM	2:40 PM	360 Educational

On full days, how many minutes will be allowed for lunch?

Elementary Grades: 30 Middle/Junior HS Grades: 30 High School Grades: 30

Will the school hold regular classes or meetings on weekends or during the evenings?
If yes, please explain.

No

**NH Department of Education
Bureau of Educational Opportunities
101 Pleasant Street
Concord, NH 03301**

**NONPUBLIC SCHOOL ZONING VERIFICATION FORM
(Please Print)**

Name of School: _____

School Address: _____

Applicant's Name: _____ Tel Number: _____

Instructions: If zoning action is not required, complete Section 1. If zoning action is needed, complete Section 2. Indicate any zoning restrictions placed on this nonpublic school on this form or attach signed copies of the zoning board's decision.

Section 1:

The Nonpublic School named above DOES CONFORM to the zoning requirements of (City/Town) _____

Comments: _____

Name of Official: (please print) _____

Signature: _____

Date: _____ Telephone: _____ Email: _____

Section 2:

The Nonpublic School named above has been granted approval by the Zoning Board of (City/Town) _____

Check one.

☐ No restrictions were specified by the zoning authority.

☐ Restriction specified by the zoning authority are noted below or attached.

Comments: _____

Name of Official: (please print) _____

Signature: _____

Date: _____ Telephone: _____ Email: _____

Please include this list with your Nonpublic School Application for Initial Approval and indicate if the following attachments have been submitted with the application.

QUESTION	ATTACHMENT	YES	NO	N/A	COMMENTS
#10	Summer School Description			X	
#11	Calendar/Schedule Form	X			
#12	Fire Safety Inspection Report				in Process
#12	Health Inspection Form				in Process
#12	List and Location of all School Buildings			X	
#13	NH DES Approval for water system			X	
#14	Proof of Septic Tank Pumping .			X	
#15	Zoning Verification Form		X		
#16	Governing Board List			X	
#17	List of All Staff and Teachers	X			
#18	Organizational Chart	X			
#20	Professional Development Plan		X		
#21	Tentative First Year Budget	X			
#22	Certificate of Good Standing				Requested from NHS
#23	Proof of Federal Tax Exempt Status	X			
#26	a. Educational Purpose b. Any philosophic or religious traditions c. Procedure to evaluate school progress d. Procedure to evaluate student progress e. Expected relationship with community f. curriculum or list of objectives	X			Hand Book
#27	Graduation Requirements	X			Hand Book
#31	Student Handbooks or Guidelines	X			Hand Book
#32	School Grievance Policy	X			Hand Book
#39	Emergency Response Plan	X			Hand Book

RSA 189:64 Emergency Response Plans

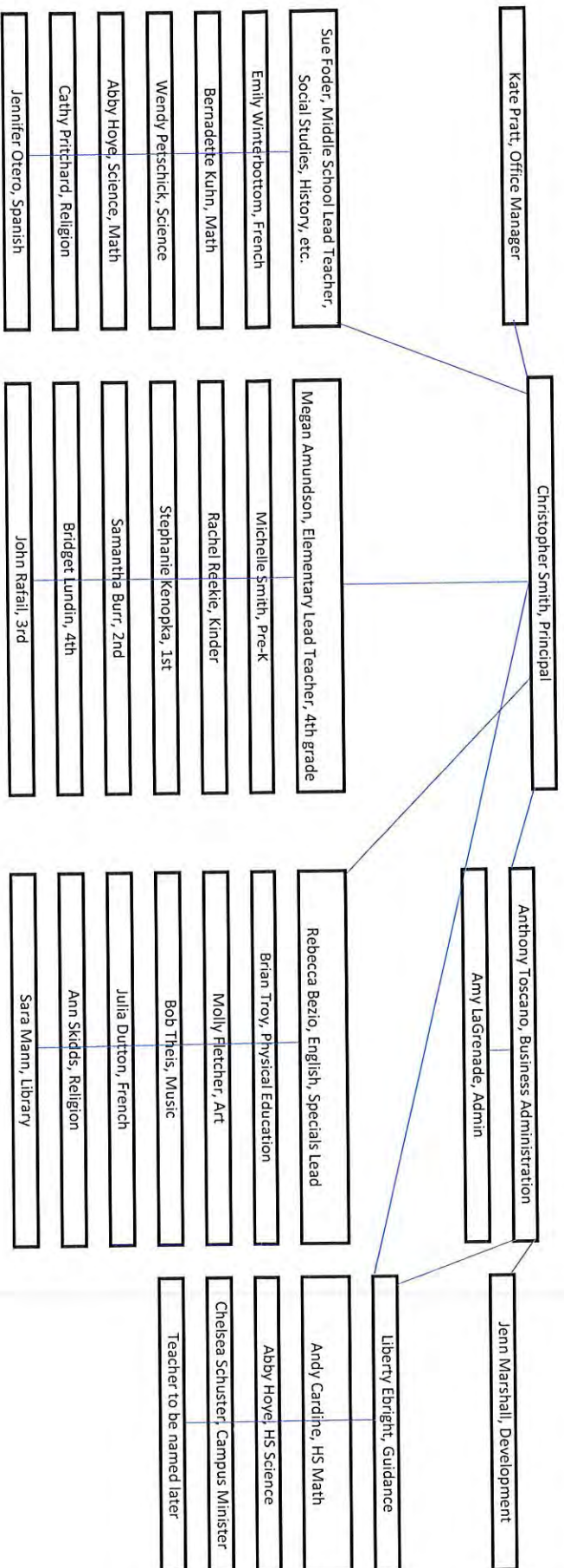
I. Within 2 years of the effective date of this section, every public and nonpublic school shall develop a site-specific school emergency response plan which is based on and conforms to the Incident Command System and the National Incident Management System. The plan shall provide that at least 2 of the currently required number of fire evacuation drills shall be emergency response drills. The plan shall address hazards including but not limited to acts of violence, threats, earthquakes, floods, tornadoes, structural fire, wildfire, internal and external hazardous materials releases, medical emergencies, and any other hazard deemed necessary by school officials and local emergency authorities. The first emergency response drill shall be conducted within one year of the completion of the plan.

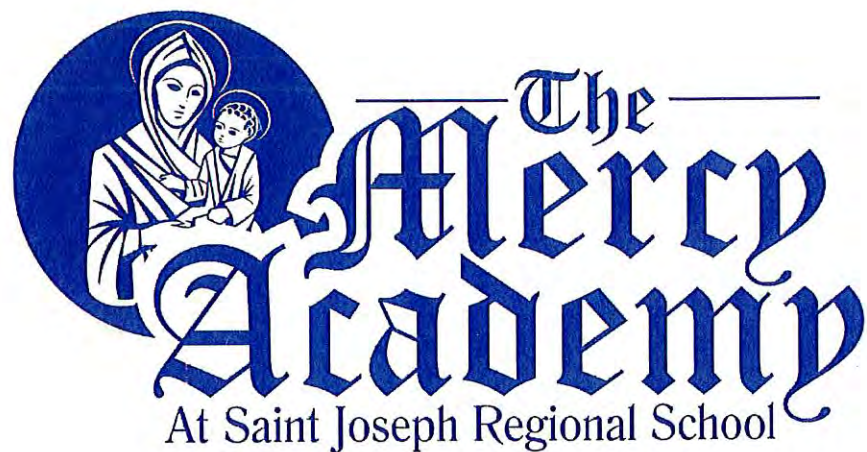
II. The plan shall be coordinated with local emergency authorities and with the emergency operations plan in the municipality in which the school is located. A school shall review its plan at least annually, and shall update the plan, as necessary. The director of homeland security and emergency management, department of safety shall assist school districts in conducting training for and providing support to school districts in the development, implementation, and review of an emergency response plan, as may be needed.

Source. 2007, 92:1, eff. July 1, 2007

189:17 Flags; Penalty. -The school board shall supply a United States and a New Hampshire state flag; the flags shall be made not less than 5 feet in length, with a flagstaff and appliances for displaying the same, for every schoolhouse in the district in which a public school is taught, at the expense of the district. They shall prescribe rules and regulations for the proper custody, care and display of these flags; the regulations shall require that wherever possible, the United States flag and the New Hampshire state flag shall be displayed on separate staffs of equal height. When the flags are displayed on the same staff, the United States flag shall be displayed above the New Hampshire flag. The regulations shall further require that such flags shall be displayed prominently outside of the schoolhouse. When they are otherwise displayed, the flags shall be placed conspicuously in the principal room of assembly of the schoolhouse. The governing board of every private school shall supply a United States flag, such flag to be made not less than 5 feet in length, with a flagstaff and appliances for displaying same. They shall make provisions similar to those required in the public schools for the display of said flag. Any members of a school board or the governing board who shall refuse or neglect to comply with the provisions of this section shall be guilty of a violation.

Saint Joseph Regional School
Organization Chart FY 2020-21





Our Lady of Mercy Academy Family Handbook 2020-2021

Fostering Kind, Thoughtful, Joyful Souls

This is where we will insert the table of contents

INTRODUCTION

The Family Handbook is provided to acquaint students and parents/guardians with information and expectations about Our Lady of Mercy Academy. Students, parents and guardians are expected to be knowledgeable about the contents of this document.

Enrollment at Our Lady of Mercy Academy signifies an acceptance of, and willingness to abide by, all the policies set forth in this handbook. Students and parents/guardians agree to conduct themselves according to these guidelines and to treat others with dignity and respect. The school reserves the right to ask students to withdraw for conduct that is undesirable or is detrimental to the individual student or to other members of the school community. Enrollment implies a partnership between the school and the family. Parents are held to the same standard as students with regard to respect for members of the school community. If this partnership breaks down, parents can be required to withdraw the student from school.

The school reserves the right to alter policies at any time without prior notice and will endeavor to announce such changes in a timely manner.

VISION and MISSION

Our Lady of Mercy Academy will foster the spiritual, intellectual and academic development of every student in order to prepare them for college, their community, and the world at large. The vision of Our Lady of Mercy Academy is to create positive social change through every student in order to prepare them for college, their community, and the world at large. molding of future community leaders.

HISTORY

Our Lady of Mercy Academy takes root from over 130 years of education provided by Saint Joseph Regional School in Keene, NH. SJRS has been welcoming families of all faiths from the greater Monadnock Region for over a century. Founded in 1886 by Saint Bernard Parish as a parochial school, the first students were welcomed by the Sisters of Mercy who served as staff.

SJRS alumni have been among the valedictorians and salutatorians at local high schools for the last six years consecutively. Our graduates have been accepted at Deerfield Academy, St. Paul's School, Andover, Exeter, Northfield Mount Hermon, Vermont Academy, Holderness, Eaglebrook, Dublin, Tabor, Winchendon, and many other private high schools.

Our Lady of Mercy Academy offers a co-educational college preparatory program in a supportive Christian atmosphere. The school program promotes high academic standards and positive self-esteem, encourages personal responsibility and public service, and instills a sense of community.

Admissions:

Our Lady of Mercy Academy welcomes all students of varying races, religions, national origins, and social-economic backgrounds. Admission is not limited to members of the Roman Catholic faith and OLMA believes that the perspectives of its non-Catholic students enriches the diversity of the Academy and enlivens inter-faith dialogue.

Students entering OLMA for the first time, are required to meet with the Principal before enrolling and to schedule a school visit.

Registration The following materials are required at the time of registration:

1. Completed Registration Form, including student essay.
2. Completed Enrollment Agreement
3. Check to Our Lady of Mercy Academy for a Registration Fee of \$175.00
4. Copy of Birth Certificate
5. Copy of Baptismal Certificate (Catholics)
6. Completed Physician's Report of School Health Examination, including up-to date immunization records.
7. Completed Consent for Release of Educational Records
8. Completed Fundraising Agreement Form
9. Complete copy of transcript grades 6-8.

TUITION PAYMENT POLICY

The following payment plans are available:

1. Full payment due by July 15th, with a 3% discount given.
2. 11 monthly payments beginning in August through the F.A.C.T.S. Tuition Management Program.

The F.A.C.T.S. Tuition Management Program is an automated payment plan. Payments begin in July and will be deducted from your account on the 5th or 20th of each month. It is an 11-month payment plan.

Unpaid accounts will result in non-registration for the following school year. Students will not be permitted to begin classes until all outstanding tuition payments have been made. If necessary, the school will employ a collection agency to recoup our committed funds to educate your child/ren.

TRANSFERS AND WITHDRAWALS

Notice of a student's withdrawal from Our Lady of Mercy Academy should be made by the parent to the Principal no later than one week in advance of the withdrawal. This will enable teachers to secure grades and the office to settle accounts. Before school records will be released, a signed Consent for Release of Educational Records from the receiving school must be obtained. Financial payments need to be up-to-date and refunds of advanced payments will be given accordingly.

CONSULTATIVE BOARD Purpose The Consultative Board is approved by the Catholic Diocese of Manchester and is made up of Monadnock Regional parishioners and citizens with expertise to help guide the administration in financial and policy-making issues.

Arrival and Dismissal

Bell Schedule M-Th 80 min blocks	
8:10	First Bell
8:15 - 9:35	Block 1
9:40 - 11:00	Block 2
11:00 - 12:00	Lunch & Flex Time
12:00 - 1:20	Block 3
1:25 - 2:45	Block 4

Bell Schedule Friday 80 min blocks	
8:10	First Bell
8:15 - 8:40	Flex Time
8:45 - 9:20	Block 1
9:30 - 10:15	Mass
10:25 - 11:10	Block 1
11:10 - 12:00	Lunch & House Mtg
12:00 - 1:20	Block 2
1:25 - 2:45	Block 3

Bell Schedule 2 Hour Delay M-Th 50 min blocks	
10:10	First Bell
10:15 - 11:05	Block 1
11:10 - 12:00	Block 2
12:00 - 1:00	Lunch & Flex Time
1:00 - 1:50	Block 3
1:55 - 2:45	Block 4

Bell Schedule 2 Hour Delay Fridays 70 min blocks	
10:10	First Bell
10:15 - 11:05	Block 1
11:10 - 12:00	Block 2
12:00 - 1:00	Lunch & Flex Time
1:00 - 1:50	Block 3
1:55 - 2:45	Block 4

Graduate Goals

We expect our graduates are well rounded young people who:

- are aware of their own gifts, talents, and limitations
- continually develop their own spiritual, emotional, mental and physical health.
- commit to compassion, justice, and service in both their personal and professional lives
- demonstrate a willingness to become active members in their local communities
- are prepared to meet the academic demands of college
- strive to reach their intellectual potential
- use their intellectual, physical and emotional gifts to serve others more effectively and generously

Notification of Student Absence or Dismissal

A parent/guardian must call or email the front office as early as possible to state the specific reason for the absence. Phone messages can be left 24 hours a day at the following extensions: ??? If no telephone contact has been made, then students must present a note explaining the reason for the absence(s) on the day the student returns to school. Only the school administration may excuse a student from school attendance. A telephone call or a note from a parent does not, in itself, excuse an absence. Failure to call or present a note within 24 hours will automatically result in the absence being unexcused and will be deemed a truancy. Once the reason is made known to the administrator, a determination will be made as to whether it is excused or unexcused. Students must report to the front office to obtain a dismissal slip. Students are not to leave the building unless they have coordinated their dismissal properly with their house office.

Make-up Work: Students who miss class time often find themselves at a disadvantage since no amount of make-up work can be substituted for actual classroom experience and teacher instruction.

Excused absence or tardy: Students are required to make up any work missed due to excused absences or tardiness. Students are generally allowed the same number of days to make up the work as the number of days missed. Students must make appropriate arrangements with their teachers and should not assume that they know their new due dates without asking.

Unexcused absence or tardy: Students will not be permitted to get credit for work missed due to unexcused absences or tardiness. The assignments will earn grades of zero. This includes class work, quizzes, and tests, as well as homework due on the day of the absence. Students are expected to complete make-up work, but credit will not be granted.

Homework Requests for Absences: It is the responsibility of the student to make arrangements directly with the teacher for making up any work missed for an excused absence. Generally, one day will be allotted for each day absent to make up work missed due to an excused absence. For students who have an excused absence, missed work may be made up for credit. Students should meet with teachers on the first day back to school to ensure that all missed assignments/projects are understood. If a student has an excused, extended absence of three or more days, parents should request homework/schoolwork by calling ???

Student Conduct

At all times students must conduct themselves appropriately and in a manner befitting an Our Lady of Mercy Academy student. The following is exemplary but not exclusive of such behavior: being sensitive to the needs of others, being cooperative with those in authority, and displaying honesty and integrity. If a student repeatedly fails to conduct themselves in a manner consistent with this policy, they subject themselves to corrective actions, which may include probation, suspension, and/or dismissal.

Above all, students are required to treat others with respect. Harassment, bullying, or demeaning others will not be tolerated.

This prohibition against acts of harassment applies to all students, regular and temporary, part-time or full-time employees, volunteers, itinerant instructors, and consultants. It also applies equally to clergy, religious and laypersons.

Electronic Equipment: Except for cellular telephones and the student's school-issued laptop, students may not have radios, tape players/recorders, gaming devices, smart watches, video cameras or other electronic communication equipment of any type on campus. All such equipment is the property of Our Lady of Mercy Academy and may be used only for school purposes, as specified in the Student Technology Policy.

The school recognizes the convenience, entertainment, educational, logistical and safety advantages of cellular phones and/or iPods and mp3 players. A student may have these electronic devices at school, but use will be limited to passing periods and during lunch. Use of such devices during class time is prohibited unless directed by a teacher for legitimate educational purposes. Teachers will practice a turn in/turn off policy at the beginning of class. Devices will be returned at the end of every class. Violation of this rule may result in confiscation of the device and/or other corrective action. The school reserves the right to examine any such confiscated device, and when appropriate, a student may be held accountable for violations of this behavior policy if there is evidence of such violation on the confiscated device.. If a student's cell phone is confiscated, a parent must pick the phone up from the office. Students are responsible for notifying their parents if their cell phone has been taken.

Medication: Use or possession of any medication while a student is on campus without the prior knowledge of the office is strictly prohibited. All student medications must be kept in the office and will be administered by trained Mercy Academy staff. Frequently used devices such as inhalers must be cleared by the school administration but then may be carried by the student.

Tobacco/Vaping: Smoking, vaping or the use of smokeless tobacco by a student is strictly prohibited at all times on school property and the area immediately adjacent to the school. Also, use and/or possession of any tobacco or vaping product is prohibited for students at all school related functions.

Dress and Grooming: Since the educational process is a formal endeavor, OLMA has a student dress code. This dress code supports the attitude of respect we have for one another. Cleanliness, neatness, sensibility, reasonable modesty, and safety (in the case of shoes) guide the choice of the dress code.

Students may wear dress or casual slacks. Blouses and casual/dress shirts with a collar are acceptable. Skirts, dresses and shorts must reach the top of the knee. Ripped, torn or frayed pants are not allowed, however, denim jeans will be permitted.. Hair must be clean and worn out of a student's face. Shoes must have a back; no flip flops or slides.

Care and Use of Facilities: Students are expected to use the buildings, furnishings and equipment only for the purposes intended. A student who by his or her action causes damage to school property is obliged to replace that property. Committing or attempting to commit any act of vandalism against school property, the property of another school, the property of any member of the faculty, staff or student body, either on or off campus, or any act that affects a person's life, health or property, is considered a very serious offense. Consequences for such an act may include suspension or dismissal.

Campus Cleanliness: Students should take pride in their school and assume responsibility for the cleanliness of its buildings and grounds.

Parking Policy: Students who hold a valid New Hampshire driver's license may apply for a parking permit. Students who are granted parking privileges will be charged a \$25 annual fee to help defer the cost of parking lot maintenance.

Off Campus Lunch: Off-campus lunch privileges may be granted to Sophomores, Juniors and Seniors. The following criteria must be met:

- Students must maintain a 3.0 GPA.
- Parents/guardians must approve off-campus lunch for their child. The Off-Campus Lunch permission form must be signed and on file with the OLMA office.
- Students leaving campus must have a cell phone turned on and with them while off campus.
- Students must sign-out in the OLMA office when leaving and sign-in when returning in the Student Sign-in/out log.
- Students are expected to return and be in their next class on time.

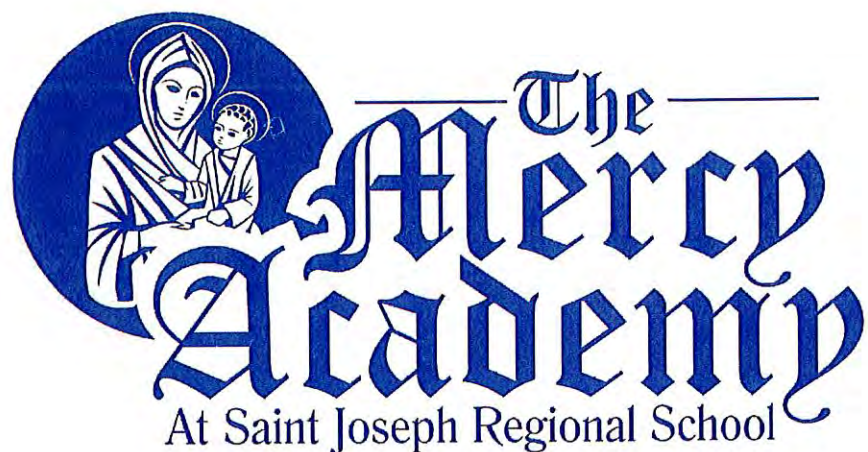
This is a privilege that can be revoked if:

- A student engages in conduct unbecoming of an OLMA student.

- A student's GPA drops below 3.0
- A student fails to sign-out/sign in with the OLMA front office.
- A student is late returning to class more than once.

Contact Information

Need the address and to better define who will be the primary operation contact (Amy, I would guess) and who the top executive contact should be (Chris, for sure) and what emails we're using (separate from SJRS emails or use the same?)



Our Lady of Mercy Academy
of
Saint Joseph Regional School
Program of Studies
2020-2021

Fostering Kind, Thoughtful,

Joyful Souls

Our Lady of Mercy Academy is a Catholic school welcoming families of all faiths from the Monadnock area. Our faith-based school program promotes high academic standards and positive self-esteem, encourages personal responsibility and public service, and instills a sense of community.

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Purpose of the Program of Studies

The information in this guide is designed to help students and parents with the selection of courses for ninth through twelfth grades. Students should study this publication and consult with their parents, school counselor, and teachers in planning their individual program of study. The school counselor can help with planning by analyzing test scores and records of past achievements and by discussing current interests and long-term goals. The school counselor also has up-to-date information available about various training programs, pre-college summer programs, colleges, universities, and employment possibilities.

Graduation Requirements

The *minimum* graduation requirements are:

- 8 required Humanities Credits: Humanities I, II, III, IV
- 4 required Math Credits that must include Algebra I, Geometry, and Algebra II
- 4 required Science Credits that must include Biology, Chemistry, and Environmental Science
- 4 required Theology Credits
- 4 required Mercy Project Credits
- 1 required Physical Education Credit: PE I, PE II
- ½ required Health Credit
- 2 required Foreign Language Credits
- 2 required Fine Arts Credits
- 2.5 elective credits chosen by the student

Total number of required credits: 32

Promotion Policies

Promotion to the next grade is based on the total cumulative number (units) of credits earned by a student at the end of the school year. They are:

From Grade 9 – 10	8 credits
From Grade 10 – 11	16 credits
From Grade 11 – 12	24 credits

Grading Scale

LETTER GRADE	NUMBER RANGE	GPA	AP COURSES
A +	100-98	4.0	5.0
A	97-95	4.0	5.0
A-	94-92	3.7	4.7
B+	91-89	3.3	4.3
B	88-86	3.0	4.0
B-	85-83	2.7	3.7
C+	82-80	2.3	3.3
C	79-77	2.0	3.0
C-	76-74	1.7	2.7
D+	73-71	1.3	2.3
D	70-68	1.0	2.0
D-	67-65	.7	1.7
F	64-0	0	0

Report Cards

All interim progress reports and report cards will be sent to parents by e-mail through Renweb.

Test Records

Parents have the right to have their child's test score omitted from his/her transcript for the high school credit course. Should parents choose to omit the test record from the transcript the parents should submit a written request to the principal of the high school where the student attends. Questions concerning this option should be directed to your child's counselor.

Honor Graduates

Graduates with a numerical average of 93.5 and above will be recognized as Honor Graduates. The top ten percent of students in the graduating class will be recognized separately at graduation in alphabetical order. The top graduates will be further recognized through the following cum laude system:

- 93.5 – 95.9 cum laude
- 96 – 97.9 magna cum laude
- 98 – 100 summa cum laude

HIGH SCHOOL CURRICULUM

General Information

Renweb Parent Web

Renweb is a web-based student information system used by Saint Joseph Regional School to maintain student data including attendance, grades, and course information. In order to gain access to Renweb, a parent or guardian must present a picture ID to an authorized school official. At that time a login and password will be assigned. The website to connect to Parent Portal is

Registration

During registration, students will be given information concerning course selection for the coming year. The information in this guide should be used in planning a program of studies. The courses listed will be offered for the school year only if there is sufficient enrollment and available staff. Grade levels listed for courses indicate the grade(s) in which the course is normally taken. All students will be expected to maintain a full-day schedule of classes in order to meet at least the minimum standards necessary for graduation as mandated by the state of New Hampshire Board of Education.

Advanced Placement Courses

An Advanced Placement Course is a college level course taught in the high school context using a standardized course syllabus aligned with the College Board Advanced Placement test for that course. The advanced placement courses are for those students willing to accept the challenge of a rigorous academic curriculum. The degree of difficulty, workload, and time required are equivalent to an introductory college course. Students and parents should work closely with counselors to ensure that

the four-year plans include the prerequisites and subsequent advanced courses.

Teachers who teach Advanced Placement courses receive specialized training from College Board to ensure preparation to deliver the curriculum. Course syllabi, including content, instructional materials, and activities are suggested by the College Board and are designed to prepare students for the optional AP exams at the end of each course. Earning qualifying scores on such exams *may* result in college credits being granted in those subject areas. However, this decision is made by the individual college.

EXTENDED LEARNING OPPORTUNITIES

Extended Learning Opportunities provide multiple ways for students to learn outside of the classroom and achieve credit towards High School Graduation. These personalized learning opportunities are founded on student interest and include rigorous content. They offer authentic opportunities for students to collaborate with a Certified Teacher and/or a community partner to demonstrate competencies outside of a traditional classroom.

ELO's may take many forms, including independent study, private instruction, performing groups, and internships. ELO's are generated by student interest or need. Extended Learning Opportunities include four components: research, reflection, product and presentation. Assessment is based on achievement and demonstration of High School Competencies.

COURSE DESCRIPTIONS

The following pages describe Mercy Academy course offerings. Course selection patterns may affect course offerings. Students registered for a class with an enrollment too small or too large are notified by the school counselor and given the opportunity to make another course selection.

LIBERAL ARTS

Humanities is a year-long course that fulfills both the English and History requirement at Mercy Academy. Each Humanities Course is designed to parallel works of literature with historical time periods and philosophies.

Humanities I

2 Credits; Year Long

This course examines the relationship between the individual and society in a selection of literary texts spanning from Ancient World History up to the Renaissance in Europe. Students study texts in

translation. Selected readings may include: Homer's *Odyssey*, the *Epic of Gilgamesh*, the Ancient Indian *Mahabharata*, Saint Augustine's *Confessions*, Confucius' *Analects*, Plato's *Dialogues* among many others.

Humanities I will focus on a study of ancient cultures from the earliest written records through the end of the middle ages, with particular attention to the interaction between humans and their environment and the relationship of philosophy to the development of territories and states.

Humanities II

2 Credits; Year Long

This course continues where Humanities I ended (The Renaissance) and continues chronologically through history with a focus on European History. Students will investigate significant events, individuals, developments, and processes throughout the world up to and including the 20th century. Literary selections will include the works of Shakespeare, Swift, De Bergerac, Milton, Basho, Moliere, Austen, among many others.

Humanities III

2 Credits; Year Long

This course will focus on the political, social, cultural, and philosophical history of America from its foundations in the 16th century through the Civil War. Students will also study the history of Native Americans and their cultures. Authors and philosophers will include Jefferson, Paine, Franklin, Emerson, Poe, Hawthorne, Melville, Stowe among others.

Humanities IV

2 Credits; Year Long

This course will continue where Humanities III ended, focusing on the time period following the Civil War to the Present Day. Authors and philosophers will be pulled from a wide variety of cultures, decades, and genres.

Psychology

.5 Credits; Semester long

Psychology is the scientific study of behavior and mental processes. Focused on the fundamental facts and principles of psychology, it explores the broader context of contemporary personal and social concerns, including the latest research and medical breakthroughs by neuroscientists in understanding the functions, mapping, and healing of the human brain. The topics covered will also enhance the students' awareness of personality and behavior, group dynamics, learning styles, multiple intelligences, and the impact and treatment of such disorders as depression, autism, and attention deficit hyperactive disorder.

Sociology

.5 Credits; Semester long

This course introduces the scientific study of human society, culture, and social interactions. Topics include socialization, research methods, diversity and inequality, cooperation and conflict, social change, social institutions, and organizations. Upon completion, students should be able to demonstrate knowledge of sociological concepts as they apply to the interplay among individuals, groups, and societies.

Introduction to Film

.5 Credits; Semester long

This one-semester course will introduce an appreciation of film, exploring the varieties of film experience, and the ways of viewing. Students will learn about the basic cinematic techniques and structures, including mise-en-scene and montage, use of cinematic time and space, the image, soundtrack, and the script. Consideration will also be given to analyzing the fundamentals of film production, directing, acting, and editing; how the elements of the production process are analyzed separately, then brought together to show how they create the emotional and intellectual impact of the film experience.

College Composition

.5 Credits; Semester long

In this course, students learn to write clearly and effectively for defined audiences through a variety of strategies. Emphasis is on the writing process from prewriting through drafting, revising, and editing. Students become aware of the variety of strategies, behaviors, habits, and attitudes and choose those that help them improve. Writing nonfiction from personal experience and observation as well as from library and electronic sources, students gain confidence and learn basic writing principles.

MATHEMATICS

Algebra I

1 Credit; Semester long

Algebra 1 is a traditional course in elementary algebra with an emphasis on solving problems. The course falls into four basic parts: 1) the four operations on real numbers and their use in the solution of simple equations and related problems; 2) polynomials, factoring, and fractions, leading to the solution of more complicated problems; 3) inequalities, functions and relations, and systems of open sentences; and 4) irrational numbers and quadratic functions and equations. A Texas Instruments TI-83 or TI-84 series graphing calculator is required.

Geometry

1 Credit; Semester long

This course is an in-depth exploration of the concepts of Euclidean plane and 3-dimensional geometry. The course emphasizes deductive reasoning and rigorous proof which are the foundations of higher mathematics. Students are required to understand and use the vocabulary and concepts of geometry. Students will develop deductive and inductive reasoning skills through the writing of proofs and problem solving. Students will practice solving problems and work on various cooperative and independent exercises, and projects in their day-to-day work. Students will complete daily assignments and maintain an organized notebook. A Texas Instruments TI-83 or TI-84 series graphing calculator is required.

Algebra II

1 Credit; Semester long

This course is offered to entering freshman who have demonstrated mastery of Algebra 1 content. The course includes in depth analysis of higher degree polynomials; analysis, interpretation and graphing of rational functions, including asymptotic behavior; an in-depth consideration of the conic sections, including transformations. A Texas Instruments TI-83 or TI-84 series graphing calculator is required.

Precalculus

1 Credit; Semester long

Precalculus is designed to give a thorough preparation for college Calculus. Most of the course is an analysis of families of functions and relations – polynomials; rational function; radical functions; trigonometric functions, including an intense study of right triangle trigonometry, its applications to vectors, circular functions, and trigonometric identities; logarithmic functions; exponential functions – and their graphs both algebraically and through the graphing calculator, including an introduction to the fundamental aspects of Calculus and an introduction to limits, derivatives, and general curve sketching. A Texas Instruments TI-83 or TI-84 series graphing calculator is required.

Calculus

1 Credit; Semester long

This course is designed for the student who is interested in pursuing a college major with a strong emphasis in mathematics. In the first part of the course, the elementary properties of functions and their inverses are reviewed, as well as specific types of functions (exponential, logarithmic, trigonometric). Subsequently, the student is introduced to the concepts of limits and continuity; differentiation and its applications to problems of extreme and related rates of change; anti differentiation and its application to the solution of differential equations; definite integrals and their application to finding areas, volumes, and length of curves. A Texas Instruments TI-83 or TI-84 series graphing calculator is required.

AP Calculus

1 Credit; Semester long

AP Calculus is meant for the student who is interested in pursuing a college major with a strong emphasis in mathematics. The course will cover three main topics of Calculus: limits, derivatives, and integrals. The course will emphasize a multi-representational approach to calculus with concepts and solutions expressed graphically, numerically, and analytically. The course represents understanding of derivatives, integrals, and limits is a priority, as well as applications of these concepts. In order to develop these concepts, functions and graphs are a fundamental part of this course. A Texas Instruments TI-83 or TI-84 series graphing calculator is required.

Statistics

1 Credit; Semester long

This course is designed to give students a foundation for further studies in math while emphasizing preparation for majors in psychology, sociology, and other non-calculus fields. The course is intended for students wishing to complete the equivalent of a one-semester non-calculus based college course in statistics and will introduce them to the major concepts and tools for collecting, analyzing, and drawing conclusions from data. A Texas Instruments TI-83 or TI-84 series graphing calculator is required.

SCIENCE

Biology

1 Credit; Semester long

Biology is a life science. This course covers the study of life from its chemical basis to the structure and function of the organism. Areas of study include Scientific Method, Chemistry of Life, Ecology, Cell Structures and Functions, Photosynthesis and Cellular Respiration, Mitosis/Meiosis, DNA, Genetics, Evolution, and the Human Body Systems. This course also aims to develop in students an appreciation for the natural world and our role in its stewardship.

Chemistry

1 Credit; Semester long

Chemistry is the scientific study of matter. This course aims to develop students as practicing laboratory scientists who can ask and answer questions of their own about what the world is made of and how and why chemical reactions occur. This course also aims to develop students' conceptual and quantitative understanding of chemical principles. Units of study in this course include the nature of the atom, naming of chemicals and compounds, bonding, the periodic table, reactions and equilibrium, stoichiometry, behavior of gases, acids, bases, and safe laboratory practices.

AP Environmental Science

1 Credit; Semester long

Environmental Science is a life science course in which students will be challenged to develop a knowledge base and demonstrate a mastery of significant environmental issues. Students will investigate local and global events and conditions that impact our planet and will be given the opportunity to enhance their appreciation of Earth's resources and assume or strengthen a lifelong commitment to the care for our fragile planet. Environmental Science will study the relationships between humans, human societies, and their natural and created environments. Topics covered will include ecosystem components and the energy flow within ecosystems, evolution and the development of biodiversity, climate effects on terrestrial and aquatic biodiversity, community ecological structure and the effects on sustainability, and the population dynamics within an ecosystem, survey of environmental problems, their causes, effects, and solutions. Further problems examined include living sustainably, organic and local foods, and fossil fuels.

Physics

1 Credit; Semester long

Physics is the scientific study of the most fundamental laws of nature. This course aims to further develop students' appreciation for and competence in the scientific method. This course also aims to develop students' conceptual and quantitative understanding of physical principles. Students perform experiments to develop proficiency in laboratory technique in applying physical principles to the analysis of experimental data. Units of study in this course include motion, Newton's Laws, collisions, energy, thermodynamics, waves, sound, light, fundamental particles of nature, radioactivity, quantum mechanics, and electricity and magnetism.

AP Biology

1 Credit; Semester long

The AP Biology course is equivalent in content, depth, and complexity to an introductory biology course at the college level. This course is designed to prepare the student to excel on the AP exam offered in May, and follows the AP curriculum closely. AP Biology is an in-depth, content-intensive study of biological principles that allows students the opportunity to engage hands-on in scientific experimentation. Units of study include cell biology, genetics, DNA technology, enzyme catalysis, photosynthesis, ecology, evolution, and physiology. Students are required to take the Advanced Placement exam in May.

AP Chemistry

1 Credit; Semester long

The AP Chemistry course is equivalent in content, depth, and complexity to an introductory chemistry course at the college level. This course is designed to prepare the student to excel on the AP exam offered in May, and follows the AP curriculum closely. AP Chemistry is an in-depth, content-intensive study of chemical principles that allows students the opportunity to engage hands-on in scientific experimentation. Units of study include chemical reactions, modern atomic theory, molecular bonding, hybridization, organic chemistry, stoichiometry, thermodynamics, kinetics, aqueous equilibrium, acids, bases, precipitation, reduction, oxidation, electrochemistry, and nuclear chemistry. Students are required to take the Advanced Placement exam in May.

THE MERCY PROJECT

The Mercy Project

Part of the students' curriculum is a Year Long class that will be part of their participation in the Mercy Project. The Mercy Project is our interpretation of a Community Service based course in which students will play active roles in both our immediate and extended neighborhoods while embodying the Spirit and values of Jesus Christ.

Grade 9 - Service

1 Credit; Year long

First Year Students will take Service, where they will study the sociological culture of community, national and global service. Students will organize and participate in events and activities

that relate to their studies and interests. This course will be team taught by teachers, clergy, professors, and community servants.

Grade 10 - Leadership

1 Credit; Year long

Sophomores will study Leadership. In this course, students will learn the psychology and sociology behind leadership, management, and organization, while continuing to develop their personal interest in local, national, and global current events and service opportunities. This course will be team taught by local managers and business owners, city officials, teachers, professors, clergy, and community servants.

Grade 11 - Business

1 Credit; Year long

Juniors at Our Lady of Mercy Academy will examine Business. In this course, third year students will learn the workings of accounting, fundraising, credit, and law with regards to participation in the formation of their own Non-Profit Organization that is geared toward service. This course will be team taught by business owners, financial advisors, teachers, professors, clergy, and other experts.

Grade 12 – The Mercy Project

1 Credit; Year long

In the first semester of their final year, seniors will put their business into Action, culminating in a local presentation of their progress in the service area of their expertise. This project will include an advisor and will be taught in an independent study.

THEOLOGY & RELIGION

Foundations of Catholicism

1 Credit; Year long

Grade 09

The course is designed to provide a foundation of Catholic Christianity. It allows the students to open themselves to God's gift of faith so that it becomes real and meaningful. The course promotes both an intellectual understanding and a spiritual appreciation for the Catholic faith. The course is divided into three components: Word, an examination of Scripture and the Formation of Catholic doctrine; Worship, an exploration of each of the seven sacraments and the summit of worship, the liturgy; and Witness, a discussion of the advantages of establishing good moral habits in order to enhance positive decision-making skills. Finally, students will discover a positive portrayal of love and life within the context of vocation and lifestyles.

Bible/Scriptures

1 Credit; Year long

Grade 10

This course provides an overview of Sacred Scripture based on Catholic principles for understanding and interpretation of the Bible. The course highlights the theme of covenant as it draws a

path through Salvation History. The different books of the Bible and important events in biblical history are examined to reveal the parts they play in Salvation History and in our world today. Using the narrative approach to reading the Bible, we will focus on the story of salvation history and the theme of God's Covenant relationship with His people beginning with the book of Genesis. Although this semester will focus on the Old Testament, the unity of the Old and New Testaments will be emphasized. Students will see how the mediators of God's covenant with humanity (Adam, Noah, Abraham, Moses and David in particular) were "types" of Christ. Students will also gain an appreciation of how the covenants of the Old Testament were perfected and fulfilled in Jesus Christ. **Second Semester Focus:** The second semester of this Scriptures course will focus on the New Testament. The heart of this course will be the examination of the Incarnation of the Son of God, His life and ministry; His suffering, death, resurrection and ascension (ie. the Paschal Mystery) through a cohesive study both of the Synoptic Gospels (Matthew, Mark and Luke) and the Gospel of John. Students will also gain an appreciation of the birth of the Catholic Church at Pentecost and its early life through the Acts of the Apostles.

Catholicism

1 Credit; Year long

Grade 11

Based on Sacred Scripture and The Catechism of the Catholic Church, this course covers the principles of faith and what it means to be Catholic. Students will discuss the relationship between reason and faith, the mystery of the Trinity, and the structure of the Church. The seven Sacraments as encounters with God's grace, the prayers of the Church, and more specifically the Eucharistic Liturgy as the most important prayer of the Church will serve to highlight the importance of the Catholic Church community as a people of God.

Ethics

1 Credit; Year long

Grade 12

Ethics is the study that deals with what is right and wrong, goodness and evil in light of action. We will examine questions proper to ethics: What is happiness? What makes a deed right or wrong? What is human fulfillment? Is there a rational basis for human action? What is human freedom? How does ethics relate to the community? We will reflect on these and other key questions by examining the ideas of Plato, Aristotle, Augustine, Thomas Aquinas, Thomas Hobbes, Immanuel Kant, John Stuart Mills and Friederich Nietzsche. Special attention will be paid to the following ethical concerns: cultural and individualistic relativism, subjectivism, determinism, rationality, and freedom. Finally, we will discuss the role which religion—and Catholic Christianity in particular—play in contemporary ethical debates.

Art I

.5 Credits; Semester long

This course is a "hands-on" class designed to develop skills in design and composition, a variety of drawing styles, and acrylic painting. Students will receive instruction in a variety of media and will be required to use each of them in the creation of original work. The study of historical examples will be a springboard for the student's creative expression. No previous drawing skills are required to take this class; just come with an open mind!

Art II

.5 Credits; Semester long

This course is geared to the student who wishes to continue with art in a more challenging direction, but it will still maintain the same level of fun and exploration as Foundations of Art, emphasis is placed on a variety of mediums and techniques. Students will explore drawing, watercolor painting, collage, scratchboard, and sculpture (without clay) to just name a few. Also, independent sketchbook work is required outside of class.

Painting

.5 Credits; Semester long

An introduction to the transparent media of watercolor painting, opaque acrylic painting and other paint media. Major emphasis is on experiencing a variety of techniques and creating composition through observation.

Graphic Design

.5 Credits; Semester long

This course is designed to acquaint students with concepts in the art of graphic design from logo development and messaging to introductory exercises and rendering in Photoshop. Students will use Adobe Illustrator and Adobe Photoshop as the mediums in rendering creative solutions to different digital challenges.

Pottery

.5 Credits; Semester long

This course is an introduction to pottery making and clay sculpture. Various decorating techniques and glazing will be taught. Students will learn of the diversity of the Ceramic Arts as they study artists both past and present. They will learn how the pottery of other cultures has influenced the creation of contemporary ceramics.

Chorus

1 Credit; Year long

This full credit course will focus on the development of basic vocal skills in a group setting. Students participate in chorus for a full year. Students will explore various styles of vocal music including traditional, popular, blues, rocks, jazz. etc. Rehearsal techniques will be presented, with an emphasis on the development of the vocal ensemble for the purpose of school and/or public performance. Students will also learn basic music reading skills, harmony and theory as it applies to vocal performance. Other music skills that will be developed include part-singing, pitch control, rhythm dictation, breathing, musical interpretation, phrasing and enunciation. Chorus students should be prepared to participate in all public performances. Chorus also serves as the core of our music ministry singers.

Band

1 Credit; Year long

This performance-based class will give students the opportunity to experience ensemble playing in concert band style. Emphasis will be placed on both individual proficiency and ensemble sound. Students may take this course more than one year. Students will perform a variety of musical genres including pop, classical and contemporary music. Students will learn the concepts of sound, blend, intonation, reading, phrasing and other performance considerations. Students will be expected to participate in various school and public appearances. Students are required to provide their own instruments.

Instrumentation

1 Credit; Year long

This year long course is designed for those students who would like to focus their study on a playing specific instrument. Upon completion, students should be able to install, maintain, and tune instrumentation.

HEALTH & PHYSICAL EDUCATION

Physical Education

.5 Credits; Semester long

Physical literacy is the ability, confidence, and desire to be physically active for life. This class encourages these concepts and emphasizes lifelong fitness practices while also providing opportunity for involvement in game play. Personal fitness principles and concepts are introduced and practiced throughout the semester during activities in the gymnasium as well as the outdoors. In addition, strategies, tactics, and concepts necessary for participation in games will be explored. Extended learning is essential in meeting curriculum goals and may include activities ranging from weekly logs to health and fitness projects.

Health

.5 Credits; Semester long

This course will help students acquire an understanding of health concepts and skills to apply when making healthy decisions to improve, sustain, and promote personal, family, and community health. The goal is to increase health literacy to recognize, apply knowledge and skills to enhance personal health and the health of others. A skills-based approach is the practice for this course. Topics, including though not limited to, mental health, substance abuse, consumer health and family life will be explored in this comprehensive curriculum.

FOREIGN LANGUAGES

French I

1 Credit; Semester Long

Level I French focuses on students' communicative competence in French and their understanding of the cultures) of French-speaking countries. In level I French classes, students learn to communicate in real-life context about topics that are meaningful to them. French I concentrates on the development of the four language skills: listening, speaking, reading, and writing. Emphasis is placed on the use of French in the classroom as exclusively as possible and on the use of authentic materials to learn about the language and the culture. An important component of French classes is the use of the French language beyond the classroom in order to apply knowledge of the language in the real world. In many cases, this is accomplished through the integration of technology in the classroom.

French II

1 Credit; Semester Long

In French II, students continue to develop their proficiency in the three modes of communicative competence: interacting with other speakers of French, understanding oral and written messages in French, and making oral and written presentations. They are exposed to more complex features of the French language. They continue to focus on communicating about their immediate world and daily life. Emphasis continues to be placed on the use of French in the classroom as well as on the use of authentic materials to learn about the culture.

French III

1 Credit; Semester Long

In French III, students continue to develop their proficiency in the three modes of communicative competence. They communicate using more complex structures in French on a variety of topics, including some of an abstract nature, such as social rights and responsibilities. They comprehend the main ideas of authentic materials that they read and hear and are able to identify significant details when the topics are familiar. French is used almost exclusively in the class as students develop the ability to discuss topics related to historical and contemporary events and issues.

French IV

1 Credit; Semester Long

In French IV, students continue to develop their communicative and cultural competence, understanding oral and written texts, and making oral and written presentations in French. They are able to exchange and support opinions on a variety of topics related to historical and contemporary events. They comprehend spoken and written French texts from a variety of authentic sources as well as produce compositions containing well-developed ideas on various topics. Students compare and contrast everyday situations with those of our own culture. Additional emphasis is placed on appropriate verbal and non-verbal behaviors. Students will focus on global understanding of the language, will increase accuracy and appropriateness of oral communication, with emphasis on creativity, will examine authentic materials and explore various literary genres, and will refine their creative expression. Students are strongly encouraged to explore individual interest areas in depth and share these interests

with the class.

Latin I

1 Credit; Semester long

This course introduces the students to the basics of Latin language and contributions of Roman civilization to the Western World. Students will demonstrate a mastery of both Latin and English grammar, recognize English derivatives from Latin words and explore various aspects of Roman history, art, and culture. They will make cue cards to develop vocabulary and will submit projects and translations which illustrate the contributions made to Western civilization by the Greeks and Romans.

Spanish I

1 Credit; Semester Long

Level I Spanish focuses on students' communicative competence in Spanish and their understanding of the cultures of Spain and other Hispanic countries. In level I Spanish classes, students learn to communicate in real-life context about topics that are meaningful to them. Spanish I concentrates on the development of the four language skills: listening, speaking, reading, and writing. Emphasis is placed on use of Spanish in the classroom as exclusively as possible and on use of authentic materials to learn about the language and culture. An important component of Spanish classes is the use of the Spanish language beyond the classroom in order to apply knowledge of the language in the real world. In many cases, this is accomplished through the integration of technology into the classroom.

Spanish II

1 Credit; Semester Long

In Spanish II, students continue to develop their proficiency in the three modes of communicative competence; interacting with other speakers of Spanish, understanding oral and written messages in Spanish, and making oral and written presentations. They are exposed to more complex features of the Spanish language. They continue to focus on communicating about their immediate world and daily life. Emphasis continues to be placed on the use of Spanish in the classroom as well as on the use of authentic materials to learn about the culture.

Spanish III

1 Credit; Semester Long

In Spanish III, students continue to develop their proficiency in the three modes of communicative competence. They communicate using more complex structures in Spanish on a variety of topics, including some of an abstract nature. They comprehend the main ideas of authentic materials that they read and hear and are able to identify significant details when the topics are familiar. Spanish is used almost exclusively in the class as students develop the ability to discuss topics related to historical and contemporary events and issues.

Spanish IV

1 Credit; Semester Long

In Spanish IV, students continue to develop their communicative and cultural competence, understanding oral and written texts, and making oral and written presentations in Spanish. They are able to exchange and support opinions on a variety of topics related to historical and contemporary events. They comprehend spoken and written Spanish texts from a variety of authentic sources as well as produce compositions containing well-developed ideas on various topics. Students compare and contrast everyday situations with those of our own culture.

*This Program of Studies for Our Lady of Mercy Academy of Saint Joseph Regional School was freely adapted from Catholic High Schools' curriculum across the United States.

**This Program of Studies is currently (as of 10/18/18) a work in progress and may be adapted or changed based on educational needs and variables.

Grievance Policy

Complaint Review Process for Parents/Guardians and Students

Conflicts may occur among students, parents/guardians, and school staff, and all parties are encouraged to resolve these conflicts when they occur. However, if the involved parties are unable to resolve their conflicts, families may use the complaint review process for additional assistance. All those participating in the complaint review process are responsible for striving toward reconciliation and acting in good faith in the spirit of the Gospels. Legal representation is not permitted at any meeting or mediation of the complaint review process. Any person filing a complaint is to be free from restraint, coercion, discrimination, or reprisal in any form. The complaint review process must be included in the parent/student handbook.

1 Addressing Complaints at the Local Level: Schools

The person bringing the complaint is encouraged to try to resolve the complaint by discussing it with the people who are directly involved at the school.

If the complaint is not resolved, the person bringing the complaint should discuss it with the principal (or the pastor, if the principal is the subject of the complaint).

For elementary schools, if the principal is unable to resolve the conflict, the principal will bring the pastor into the process as appropriate.

After reviewing the facts and facilitating discussion of the problem, the principal or pastor will respond to the person bringing the complaint. In high schools, if the complainant is dissatisfied with the principal's decision, the complainant may request review of the decision through an appeals process that is determined by the high school.

2 Escalating Complaints to the Central Level: Department of Catholic Schools

If the complaint is not resolved at the local level, the complainant may request additional review in writing to the assistant superintendent at the Department of Catholic Schools.

The superintendent will review the complaint (with such consultation as may be appropriate) in a timely fashion and will endeavor to resolve the matter in keeping with the policies and/or regulations of the archdiocese and school. If an agreed-upon outcome is not possible, the assistant superintendent shall make a final and binding determination, and communicate that determination in writing to all parties.

Diocesan School & Finance Offices, 2020-2021 Budget, Our Lady of Mercy Academy, Keene

	2018-2019 <u>Actual</u>	2019-2020 <u>Budget</u>	2019-20 YE <u>Anticipated</u>	2020-2021 <u>Budget</u>
<u>Number of Students for Tuition Calculations</u>				
1. Number of Students - Grade 9	0	0	0	9
2. Number of Students - Grade 10	0	0	0	7
3. Number of Students - Grade 11	0	0	0	0
4. Number of Students - Grade 12	0	0	0	0
Total Students	0	0	0	16
<u>Number of Students for Fee Calculations</u>				
1. # of Students - Registration	0	0	0	16
2. # of Students - Transp. Fees	0	0	0	0
3. # of Students - Insurance Fees	0	0	0	0
4. # of Students - Athletic Fees	0	0	0	0
5. # of Students - Graduation Fees	0	0	0	0
6. # of Students - Application Fees	0	0	0	0
7. # of Students - Testing Fees	0	0	0	0
8. # of Students - Technology Fees	0	0	0	16
9. # of Students - Activity Fees	0	0	0	0
10. # of Students - Other Fees	0	0	0	0
<u>Tuition Rate</u>				
1. 9-12 Tuition Rate	\$0	\$0	\$0	\$8,000
<u>Fee Amounts</u>				
1. Registration Fee	\$0	\$0	\$0	\$50
2. Transportation Fee	\$0	\$0	\$0	\$0
3. Insurance Fee	\$0	\$0	\$0	\$0
4. Athletic Fee	\$0	\$0	\$0	\$0
5. Graduation Fee	\$0	\$0	\$0	\$0
6. Application Fee	\$0	\$0	\$0	\$0
7. Testing Fee	\$0	\$0	\$0	\$0
8. Technology Fee	\$0	\$0	\$0	\$250
9. Activities Fee	\$0	\$0	\$0	\$0
10. Other Fees	\$0	\$0	\$0	\$0
<u>INCOME FROM SCHOOL CHARGES</u>				
Note: Calculations from this page are automatically posted using the information on page 1.				
<u>Tuition Income</u>				
1. 9-12 Tuition	\$0	\$0	\$0	\$128,000
Total Tuition Income	\$0	\$0	\$0	\$128,000
<u>Fee Income</u>				
1. Registration Fee Total	\$0	\$0	\$0	\$800
2. Transportation Fee Total	\$0	\$0	\$0	\$0
3. Insurance Fee Total	\$0	\$0	\$0	\$0
4. Athletic Fee Total	\$0	\$0	\$0	\$0
5. Graduation Fee Total	\$0	\$0	\$0	\$0
6. Application Fee Total	\$0	\$0	\$0	\$0
7. Testing Fee Total	\$0	\$0	\$0	\$0
8. Technology Fee Total	\$0	\$0	\$0	\$4,000
9. Activities Fee Total	\$0	\$0	\$0	\$0
10. Other Fee Total	\$0	\$0	\$0	\$0
Total Fee Income	\$0	\$0	\$0	\$4,800
Total Income From School Charges	\$0	\$0	\$0	\$132,800

Diocesan School & Finance Offices, 2020-2021 Budget, Our Lady of Mercy Academy, Keene

	2018-2019 <u>Actual</u>	2019-2020 <u>Budget</u>	2019-20 YE <u>Anticipated</u>	2020-2021 <u>Budget</u>
<u>INCOME - DEVELOPMENT</u>				
Note: "(Net Amount)" is derived by taking the gross income amount minus the gross expense amount. If the income is greater, the balance should be shown on the income side; if the expense is greater, the balance should be shown on the expense side.				
<u>Development</u>				
1. Annual Fund Drive (Net Amount)	\$0	\$0	\$0	\$5,000
2. Foundations/Grants	\$0	\$0	\$0	\$0
3. Donations/Contributions	\$0	\$0	\$0	\$8,000
4. Bequests	\$0	\$0	\$0	\$0
<u>Fundraising (Net Amounts)</u>				
List All Individual Fundraising Events				
5. Golf Tournament	\$0	\$0	\$0	\$0
6. Capital Campaign	\$0	\$0	\$0	\$0
7. Spring Event	\$0	\$0	\$0	\$10,000
8. Restricted Donations	\$0	\$0	\$0	\$0
9. KoC Donations	\$0	\$0	\$0	\$2,000
10. Hall of Fame/Distinguished Alumni	\$0	\$0	\$0	\$0
Total Development	\$0	\$0	\$0	\$25,000
<u>BUSINESS, ATHLETIC, AND OTHER INCOME</u>				
<u>Business Income</u>				
1. Book Store (Net Amount)	\$0	\$0	\$0	\$500
2. Cafeteria	\$0	\$0	\$0	\$0
3. Concessions	\$0	\$0	\$0	\$200
4. Rental Income	\$0	\$0	\$0	\$0
5. Driver Education Income	\$0	\$0	\$0	\$0
6. Other Business	\$0	\$0	\$0	\$0
Total Business Income	\$0	\$0	\$0	\$700
<u>Athletic Income</u>				
1. Admissions	\$0	\$0	\$0	\$0
2. Boosters	\$0	\$0	\$0	\$0
3. Other Athletic	\$0	\$0	\$0	\$0
Total Athletic Income	\$0	\$0	\$0	\$0
<u>Other Income</u>				
1. Campus Ministry	\$0	\$0	\$0	\$0
2. Student Activity	\$0	\$0	\$0	\$0
3. Interest	\$0	\$0	\$0	\$0
4. Shared Services	\$0	\$0	\$0	\$0
5. Miscellaneous 2 (unprotected)	\$0	\$0	\$0	\$0
Note: Miscellaneous 1 & 2 are unprotected - please enter description over the word "Miscellaneous."				
Total Other Income	\$0	\$0	\$0	\$0
Total Busin., Ath., and Other Income	\$0	\$0	\$0	\$700
<u>Other Income, Non-Traditional</u>				
1. Released from Restrictions	\$0	\$0	\$0	\$0
The first three columns of the "Total School Income" need to be manually entered and are unprotected.				
TOTAL SCHOOL INCOME	\$0	\$0	\$0	\$158,500

Diocesan School & Finance Offices, 2020-2021 Budget, Our Lady of Mercy Academy, Keene

2018-2019
Actual

**2019-2020
Budget**

2019-20 YE
Anticipated

**2020-2021
Budget**

SALARY INFORMATION

Note: Please include all individual salaries below. Additionally please indicate subject and grade level next to the salary amount. Cells are unprotected to accommodate this request.

Teacher Full time		Teacher Full Time		Teacher Full Time	
Subject & Grade	Salary	Sub.& Grade	Salary	Subject & Grade	Salary
HS Math/History	\$32,000		\$0		\$0
			\$0		\$0
			\$0		\$0
			\$0		\$0
			\$0		\$0
			\$0		\$0
			\$0		\$0
			\$0		\$0
			\$0		\$0
			\$0		\$0
			\$0		\$0
			\$0		\$0
			\$0		\$0
			\$0		\$0
			\$0		\$0
			\$0		\$0
			\$0		\$0
			\$0		\$0
			\$0		\$0
Total	\$32,000	Total	\$0	Total	\$0

Teacher Full Time		Teacher Part Time		Teacher Part Time	
Subject & Grade	Salary	Sub & Grd	Salary	Subject & Grade	Salary
	\$0		\$0		\$0
	\$0		\$0		\$0
	\$0		\$0		\$0
	\$0		\$0		\$0
	\$0		\$0		\$0
	\$0		\$0		\$0
	\$0		\$0		\$0
	\$0		\$0		\$0
	\$0		\$0		\$0
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	\$0		\$0		\$0
	\$0		\$0		\$0
	\$0		\$0		\$0
	\$0		\$0		\$0
	\$0		\$0		\$0
	\$0		\$0		\$0
	\$0		\$0		\$0
	\$0		\$0		\$0
	\$0		\$0		\$0
	\$0		\$0		\$0
Total	\$0	Total	\$0	Total	\$0

Note: The above totals will automatically post to their respective expense accounts found on pages 6.

Total Teacher Salaries

\$32,000

Diocesan School & Finance Offices, 2020-2021 Budget, Our Lady of Mercy Academy, Keene

2018-2019
Actual

2019-2020
Budget

2019-20 YE
Anticipated

2020-2021
Budget

SALARY INFORMATION-ALL OTHER

Note: Please include all individual full time and part time salaries below. Additionally please indicate title or position next to the salary amount. Cells are unprotected to accommodate this request.

Administrative Staff		Guidance Counselors		Support Staff	
Title or Position	Salary	Title or Pos.	Salary	Title or Position	Salary
Nurse/Health	15000	Guidance/ Psychology	\$35,000		\$0
	0		\$0		\$0
	\$0		\$0		\$0
	\$0		\$0		\$0
	\$0		\$0		\$0
	\$0		\$0		\$0
	\$0		\$0		\$0
	\$0		\$0		\$0
	\$0		\$0		\$0
Total	\$15,000	Total	\$35,000	Total	\$0

Development Staff		Campus Ministry		Athletic Staff	
Title or Position	Salary	Title or Pos.	Salary	Title or Position	Salary
Development/ Mercy P	\$48,000	Religion/ Youth Minist	\$30,000		\$0
	\$0		\$0		\$0
	\$0		\$0		\$0
	\$0		\$0		\$0
	\$0		\$0		\$0
	\$0		\$0		\$0
	\$0		\$0		\$0
	\$0		\$0		\$0
	\$0		\$0		\$0
Total	\$48,000	Total	\$30,000	Total	\$0

Transportation Staff		Cafeteria Staff		Custodial & Maintenance	
Title or Position	Salary	Title or Pos.	Salary	Title or Position	Salary
	\$0		\$0	Custodial & Maintenance	\$10,000
	\$0		\$0		\$0
	\$0		\$0		\$0
	\$0		\$0		\$0
	\$0		\$0		\$0
	\$0		\$0		\$0
	\$0		\$0		\$0
	\$0		\$0		\$0
	\$0		\$0		\$0
Total	\$0	Total	\$0	Total	\$10,000

Note: The above totals will automatically post to their respective expense accounts found on pages 6, 7, and 8.

Total All Other Salaries	\$138,000
TOTAL SALARIES	\$170,000

Diocesan School & Finance Offices, 2020-2021 Budget, Our Lady of Mercy Academy, Keene

	2018-2019 <u>Actual</u>	2019-2020 <u>Budget</u>	2019-20 YE <u>Anticipated</u>	2020-2021 <u>Budget</u>
<u>EXPENDITURES</u>				
Note: All salaries in the 2020-2021 budget column will automatically post from pages 4 and 5.				
<u>Instructional Services</u>				
1. Salaries Teachers ('21 - Posts)	\$0	\$0	\$0	\$32,000
2. Salaries Guidance ('21- Posts)	\$0	\$0	\$0	\$35,000
3. Substitutes	\$0	\$0	\$0	\$0
4. Staff Development	\$0	\$0	\$0	\$0
5. Guidance	\$0	\$0	\$0	\$0
6. Library	\$0	\$0	\$0	\$0
7. Equipment	\$0	\$0	\$0	\$2,000
8. Books	\$0	\$0	\$0	\$2,000
9. Supplies	\$0	\$0	\$0	\$2,000
10. Technology/Computer	\$0	\$0	\$0	\$1,000
11. Driver Education	\$0	\$0	\$0	\$0
12. Assessment/Testing Supplies	\$0	\$0	\$0	\$0
13. Other Instructional Services	\$0	\$0	\$0	\$0
Total Instructional Services	\$0	\$0	\$0	\$74,000
<u>Administrative Services</u>				
1. Salaries Admin. ('21 - Posts)	\$0	\$0	\$0	\$15,000
2. Salaries Support ('21 - Posts)	\$0	\$0	\$0	\$0
3. Salaries Develop. ('21 - Posts)	\$0	\$0	\$0	\$48,000
4. Staff Development	\$0	\$0	\$0	\$0
5. Development	\$0	\$0	\$0	\$0
6. PR and Admissions	\$0	\$0	\$0	\$2,000
7. Interest	\$0	\$0	\$0	\$0
8. Service Contracts	\$0	\$0	\$0	\$0
9. Supplies	\$0	\$0	\$0	\$500
10. Technology/Computer	\$0	\$0	\$0	\$0
11. Postage	\$0	\$0	\$0	\$0
12. Equipment	\$0	\$0	\$0	\$0
13. Phone	\$0	\$0	\$0	\$2,000
14. Professional Fees	\$0	\$0	\$0	\$0
15. Legal Fees	\$0	\$0	\$0	\$0
16. Graduation	\$0	\$0	\$0	\$0
17. Hospitality	\$0	\$0	\$0	\$0
18. Medical Supplies	\$0	\$0	\$0	\$500
19. Accreditation	\$0	\$0	\$0	\$0
20. Dues/Subscriptions	\$0	\$0	\$0	\$0
21. Finger Printing/Criminal Check	\$0	\$0	\$0	\$300
22. Other Administrative Services	\$0	\$0	\$0	\$0
Total Administrative Services	\$0	\$0	\$0	\$68,300
<u>Benefits/Insurance</u>				
1. Health Ins. (Employer Contrib.)	\$0	\$0	\$0	\$16,500
2. Dental	\$0	\$0	\$0	\$245
3. Life Insurance	\$0	\$0	\$0	\$0
4. Disability/Retirement	\$0	\$0	\$0	\$0
5. Diocesan Insurance	\$0	\$0	\$0	\$0
6. Med. & Soc. Security (Employer)	\$0	\$0	\$0	\$7,910
7. Christmas Bonus	\$0	\$0	\$0	\$0
8. Other Benefits/Insurance	\$0	\$0	\$0	\$0
Total Benefits/Insurance	\$0	\$0	\$0	\$24,655

Diocesan Insurance Includes Workers' Comp., Liability, and Property - Auto Insur. Is Under Transportation

Diocesan School & Finance Offices, 2020-2021 Budget, Our Lady of Mercy Academy, Keene

	2018-2019 <u>Actual</u>	2019-2020 <u>Budget</u>	2019-20 YE <u>Anticipated</u>	2020-2021 <u>Budget</u>
<u>Facilities - Main Building</u>				
1. Salaries Main. Staff ('21- Posts)	\$0	\$0	\$0	\$10,000
2. Electricity	\$0	\$0	\$0	\$4,450
3. Heat	\$0	\$0	\$0	\$10,000
4. Water/Sewage	\$0	\$0	\$0	\$3,450
5. Supplies	\$0	\$0	\$0	\$500
6. Building Improvement/Repairs	\$0	\$0	\$0	\$5,000
7. Equipment/Tool Purchase	\$0	\$0	\$0	\$0
8. Contract Services	\$0	\$0	\$0	\$0
9. Snow Removal	\$0	\$0	\$0	\$0
10. Trash Removal	\$0	\$0	\$0	\$0
11. Cleaning Services	\$0	\$0	\$0	\$0
12. Boiler Maintenance	\$0	\$0	\$0	\$0
13. Asbestos Management	\$0	\$0	\$0	\$0
14. Other Facilities - Main Building	\$0	\$0	\$0	\$0
Total Facilities - Main Build.	\$0	\$0	\$0	\$33,400
<u>Facilities - Other Building</u>				
1. Electricity	\$0	\$0	\$0	\$0
2. Heat	\$0	\$0	\$0	\$0
3. Water/Sewage	\$0	\$0	\$0	\$0
4. Supplies	\$0	\$0	\$0	\$0
5. Building Improvement/Repairs	\$0	\$0	\$0	\$0
6. Equipment/Tool Purchase	\$0	\$0	\$0	\$0
7. Contract Services	\$0	\$0	\$0	\$0
8. Snow Removal	\$0	\$0	\$0	\$0
9. Trash Removal	\$0	\$0	\$0	\$0
10. Cleaning Services	\$0	\$0	\$0	\$0
11. Boiler Maintenance	\$0	\$0	\$0	\$0
12. Asbestos Management	\$0	\$0	\$0	\$0
13. Other Facilities - Main Building	\$0	\$0	\$0	\$0
Total Facilities - Other Build.	\$0	\$0	\$0	\$0
<u>Campus Ministry</u>				
1. Salaries Camp. Min. ('21- Posts)	\$0	\$0	\$0	\$30,000
2. Equipment/Supplies	\$0	\$0	\$0	\$0
3. Other	\$0	\$0	\$0	\$0
Total Campus Ministry	\$0	\$0	\$0	\$30,000
<u>Athletics</u>				
1. Salaries Athletic ('21 - Posts)	\$0	\$0	\$0	\$0
2. Equipment/Supplies	\$0	\$0	\$0	\$0
3. Transportation	\$0	\$0	\$0	\$0
4. Officials	\$0	\$0	\$0	\$0
5. Dues/Subscriptions	\$0	\$0	\$0	\$0
6. Facility Rental	\$0	\$0	\$0	\$0
7. Other Athletics	\$0	\$0	\$0	\$0
Total Athletics	\$0	\$0	\$0	\$0

Diocesan School & Finance Offices, 2020-2021 Budget, Our Lady of Mercy Academy, Keene

	2018-2019 <u>Actual</u>	2019-2020 <u>Budget</u>	2019-20 YE <u>Anticipated</u>	2020-2021 <u>Budget</u>
<u>Transportation</u>				
1. Salaries Trans. ('21 - Posts)	\$0	\$0	\$0	\$0
2. Auto Insurance (Diocesan)	\$0	\$0	\$0	\$0
3. Registration/Inspection	\$0	\$0	\$0	\$0
4. Gas/Oil	\$0	\$0	\$0	\$500
5. Maintenance/Repair	\$0	\$0	\$0	\$0
6. Contract Services	\$0	\$0	\$0	\$0
7. Other Transportation	\$0	\$0	\$0	\$0
Total Transportation	\$0	\$0	\$0	\$500
<u>Student Activities</u>				
1. Student Activities Stipend	\$0	\$0	\$0	\$0
2. Equipment/Supplies	\$0	\$0	\$0	\$0
3. Other Student Activities	\$0	\$0	\$0	\$0
Total Student Activities	\$0	\$0	\$0	\$0
<u>Cafeteria</u>				
1. Salaries Caf. Staff ('21 - Posts)	\$0	\$0	\$0	\$0
2. Equipment/Supplies	\$0	\$0	\$0	\$0
3. Other Cafeteria	\$0	\$0	\$0	\$0
Total Cafeteria	\$0	\$0	\$0	\$0

Diocesan School & Finance Offices, 2020-2021 Budget, Our Lady of Mercy Academy, Keene

	2018-2019 <u>Actual</u>	2019-2020 <u>Budget</u>	2019-20 YE <u>Anticipated</u>	2020-2021 <u>Budget</u>
<u>EXPENDITURES, NON-TRADITIONAL</u>				
<u>Tuition Reductions</u>				
1. Financial Aid (3% Total Income)	\$0	\$0	\$0	\$5,000
2. Employee Discount	\$0	\$0	\$0	\$0
3. Tuition Rebate	\$0	\$0	\$0	\$27,200
4. Other Discounts	\$0	\$0	\$0	\$0
Total Tuition Reductions	\$0	\$0	\$0	\$32,200
<u>Major Capital Expenditures</u>				
1. Vehicles	\$0	\$0	\$0	\$0
2. Equipment	\$0	\$0	\$0	\$19,000
3. Fields/Grounds	\$0	\$0	\$0	\$0
4. Technology	\$0	\$0	\$0	\$20,000
<u>Major Building Specific</u>				
Cells are Unprotected to List Separately				
5.	\$0	\$0	\$0	\$0
6.	\$0	\$0	\$0	\$0
7.	\$0	\$0	\$0	\$0
8.	\$0	\$0	\$0	\$0
9 Other Major Capital Expenditures	\$0	\$0	\$0	\$0
Total Major Capital	\$0	\$0	\$0	\$39,000
<u>Principal on Loan Payments</u>				
1. Capital Debt - Principal Only	\$0	\$0	\$0	\$0
2. Operational Debt - Principal Only	\$0	\$0	\$0	\$0
Total Principal Payments	\$0	\$0	\$0	\$0
<u>Reserve Accounts</u>				
1. Cap. Impr. Escrow (2% Tot. Rev.)	\$0	\$0	\$0	\$3,170
2. Vehicle Reserve	\$0	\$0	\$0	\$0
3. Technology Reserve	\$0	\$0	\$0	\$0
4. Building Reserve	\$0	\$0	\$0	\$0
Total Reserve Accounts	\$0	\$0	\$0	\$3,170
The Capital Improvement Escrow represents 2% of the Total Income. Only 2020-21 budget will post.				
<u>ANNUAL SUMMARY</u>				
Total School Income (Posts Page 3)	\$0	\$0	\$0	\$158,500
Total Cost of Oper. (Posts from Page 9)	\$0	\$0	\$0	\$305,225
Total Gain (Loss)	\$0	\$0	\$0	(\$146,725)
Cost Per Student	#DIV/0!	#DIV/0!	#DIV/0!	\$19,077

Diocesan School & Finance Offices, 2020-2021 Budget, St. Joseph Regional School, Keene

	2018-2019 <u>Actual</u>	2019-2020 <u>Budget</u>	2019-20 YE <u>Anticipated</u>	2020-2021 <u>Budget</u>
Number of Students for Tuition Calculations:				
1. Number of Pre-K Half Day	0	0	0	0
2. Number of Pre-K Full Day	0	17	15	18
3. Number of Kindergarten Half Day	0	0	0	0
4. Number of Kindergarten Full Day	0	14	12	10
Supported Families 1-8:				
5. Number of 1-Child Sup. Families	0	46	44	42
6. Number of 2-Child Sup. Families	0	25	26	30
7. Number of 3-Child Sup. Families	0	6	5	6
8. Number of 4-Child Sup. Families	0	1	1	2
9. Number of 5-Child Sup. Families	0	0	0	0
Non-Supported Families 1-8:				
10. Number of 1-Child Non-Sup.	0	10	24	28
11. Number of 2-Child Non-Sup.	0	7	7	5
12. Number of 3-Child Non-Sup.	0	0	0	1
13. Number of 4-Child Non-Sup.	0	0	0	0
14. Number of 5-Child Non-Sup.	0	0	0	0
Number Pre-K Enrollees	0	17	15	18
Number K Enrollees	0	14	12	10
Number of 1 Through 8 Enrollees	0	142	153	169
Total Budgeted Enrollment K-8	0	156	165	179
Total Budgeted Enrollment Pre-K - 8	0	173	180	197

Number of Students for Fee Calculations:

1. # of Individuals - Registration	0	165	165	193
2. # of Families - Registration Fees	0	0	134	142
3. # of Students - Educational Fees	0	0	189	193
4. # of Students - Athletic Fees	0	0	0	0
5. # of Students - Graduation Fees	0	0	0	0
6. # of Students - Buy-Out Fees	0	13	13	13
7. # of Students - Testing Fees	0	0	0	0
8. # of Students - Computer Fees	0	0	0	0
9. # of Students - Activity Fees	0	0	0	0
10. # of Students - Other Fees	0	0	0	0

Number Projected to Pay Penalties:

1. Number of Late Fees	0	0	0	0
2. Number of Check Defaults	0	0	0	0
3. Other Penalty Fees	0	0	0	0

Tuition Rates, Fee Amounts, Penalty Charges

Note: Only the relevant column headings are in use on pages 2 and 3.

Tuition Rates:

1. Pre-Kindergarten Rate Half-Day	\$0	\$4,497	\$0	\$0
2. Pre-Kindergarten Rate Full-Day	\$0	\$5,993	\$5,993	\$6,300
3. Kindergarten Rate Half-Day	\$0	\$0	\$0	\$0
4. Kindergarten Rate Full-Day	\$0	\$5,090	\$5,090	\$6,300

Supported Families 1-8:

5. 1-Child Supported Family Rate	\$0	\$5,090	\$5,090	\$5,250
6. 2-Child Supported Family Rate	\$0	\$7,989	\$7,898	\$8,500
7. 3-Child Supported Family Rate	\$0	\$10,971	\$10,971	\$11,250
8. 4-Child Supported Family Rate	\$0	\$13,800	\$13,800	\$15,000
9. 5-Child Supported Family Rate	\$0	\$0	\$0	\$0

Diocesan School & Finance Offices, 2020-2021 Budget, St. Joseph Regional School, Keene

	<u>2018-2019</u> <u>Actual</u>	<u>2019-2020</u> <u>Budget</u>	<u>2019-20 YE</u> <u>Anticipated</u>	<u>2020-2021</u> <u>Budget</u>
Non-Supported Families 1-8:				
10. 1-Child Non-Supp. Fam. Rate	\$0	\$7,024	\$7,024	\$7,050
11. 2-Child Non-Supp. Fam. Rate	\$0	\$11,687	\$11,687	\$11,700
12. 3-Child Non-Supp. Fam. Rate	\$0	\$15,866	\$15,866	\$15,900
13. 4-Child Non-Supp. Fam. Rate	\$0	\$19,108	\$19,108	\$0
14. 5-Child Non-Supp. Fam. Rate	\$0	\$0	\$0	\$0
Fee Amounts:				
1. Individual Stud. Registration Fee	\$0	\$150	\$150	\$200
2. Family Registration Fee	\$0	\$0	\$0	\$0
3. Educational Material Fee	\$0	\$0	\$0	\$0
4. Athletic Fee	\$0	\$0	\$0	\$0
5. Graduation Fee	\$0	\$0	\$0	\$0
6. Fundraising Buy-Out Fee	\$0	\$1,700	\$1,700	\$1,700
7. Testing Fee	\$0	\$0	\$0	\$0
8. Computer Fee	\$0	\$0	\$0	\$0
9. Activities Fee	\$0	\$0	\$0	\$0
10. Other Fees	\$0	\$0	\$0	\$0
Penalty Charges:				
1. Late Fee	\$0	\$0	\$0	\$0
2. Check Default Fee	\$0	\$0	\$0	\$0
3. Other Penalty Fee	\$0	\$0	\$0	\$0

Diocesan School & Finance Offices, 2020-2021 Budget, St. Joseph Regional School, Keene

	2018-2019 <u>Actual</u>	2019-2020 <u>Budget</u>	2019-20 YE <u>Anticipated</u>	2020-2021 <u>Budget</u>
<u>INCOME FROM SCHOOL CHARGES</u>				
Note: Calculations from this page are automatically posted using the information on page1 and page 2.				
Tuition Income:				
1. Pre-Kindergarten Total Half-Day	\$0	\$0	\$0	\$0
2. Pre-Kindergarten Total Full-Day	\$0	\$101,881	\$89,895	\$113,400
3. Kindergarten Total Half-Day	\$0	\$0	\$0	\$0
4. Kindergarten Total Full-Day	\$0	\$71,260	\$61,080	\$63,000
Supported Families 1-8:				
5. 1-Child Supported Family Total	\$0	\$234,140	\$223,960	\$220,500
6. 2-Child Supported Family Total	\$0	\$199,725	\$205,348	\$255,000
7. 3-Child Supported Family Total	\$0	\$65,826	\$54,855	\$67,500
8. 4-Child Supported Family Total	\$0	\$13,800	\$13,800	\$30,000
9. 5-Child Supported Family Total	\$0	\$0	\$0	\$0
Non-Supported Families 1-8:				
10. 1-Child Non-Supported Total	\$0	\$70,240	\$168,576	\$197,400
11. 2-Child Non-Supported Total	\$0	\$81,809	\$81,809	\$58,500
12. 3-Child Non-Supported Total	\$0	\$0	\$0	\$15,900
13. 4-Child Non-Supported Total	\$0	\$0	\$0	\$0
14. 5-Child Non-Supported Total	\$0	\$0	\$0	\$0
Total Tuition Income	\$0	\$838,681	\$899,323	\$1,021,200
Fee Income:				
1. Individual Stud. Registration Total	\$0	\$24,750	\$24,750	\$38,600
2. Family Registration Fee Total	\$0	\$0	\$0	\$0
3. Educational Material Fee Total	\$0	\$0	\$0	\$0
4. Athletic Fee Total	\$0	\$0	\$0	\$0
5. Graduation Fee Total	\$0	\$0	\$0	\$0
6. Fundraising Buy-Out Fee Total	\$0	\$22,100	\$22,100	\$22,100
7. Testing Fee Total	\$0	\$0	\$0	\$0
8. Computer Fee Total	\$0	\$0	\$0	\$0
9. Activity Fee Total	\$0	\$0	\$0	\$0
10. Other Total	\$0	\$0	\$0	\$0
Total Fee Income	\$0	\$46,850	\$46,850	\$60,700
Penalty Charge Income:				
1. Late Fee Total	\$0	\$0	\$0	\$0
2. Check Default Fee Total	\$0	\$0	\$0	\$0
3. Other Fee Total	\$0	\$0	\$0	\$0
Total Penalty Income	\$0	\$0	\$0	\$0
Total Income From School Charges	\$0	\$885,531	\$946,173	\$1,081,900

Diocesan School & Finance Offices, 2020-2021 Budget, St. Joseph Regional School, Keene

	2018-2019 <u>Actual</u>	2019-2020 <u>Budget</u>	2019-20 YE <u>Anticipated</u>	2020-2021 <u>Budget</u>
<u>INCOME-ALL OTHER</u>				
<p>Note: The schools will continue to report fundraising and the annual fund as "net" amounts (income minus expense). However, all other programs (pre-k, extended care, cafeteria, transportation, etc..) will be reported as "gross" amounts. The gross income will be reflected below, while the gross expenses will be reflected in the appropriate expenditure account on this report. Therefore, all salaries and positions will posted on page 5 of this report. The miscellaneous income accounts below are unprotected cells. Please use these spaces for other income sources and note what they are.</p>				
Development:				
1. Annual Fund Drive (Net Amount)	\$0	\$0	\$0	\$32,000
2. Foundations/Grants	\$0	\$0	\$0	\$0
3. Donations/Contributions	\$0	\$6,000	\$6,000	\$6,000
4. Bequests	\$0	\$0	\$0	\$0
Fundraising (Net Amounts)				
List All Individual Fundraising Events				
5. Bingo	\$0	\$22,000	\$16,000	\$16,000
6. Auction	\$0	\$30,000	\$15,000	\$30,000
7. Catholic Schools Week	\$0	\$4,000	\$4,000	\$500
8. Adopt a Student	\$0	\$36,000	\$36,000	\$35,000
9. Fundraiser #3	\$0	\$10,000	\$5,000	\$10,000
10.	\$0	\$0	\$0	\$0
11.	\$0	\$0	\$0	\$0
12.	\$0	\$0	\$0	\$0
Total Development	\$0	\$108,000	\$82,000	\$129,500
Other Income:				
1 Diocesan Support Program	\$0	\$119,464	\$119,464	\$102,000
2 Extended Care Program	\$0	\$65,000	\$49,000	\$65,000
3 Facility Rentals	\$0	\$0	\$0	\$0
4 Prior Fiscal Year Collectibles	\$0	\$3,000	\$0	\$0
5 Athletic Income	\$0	\$0	\$0	\$0
6 Cafeteria Program	\$0	\$0	\$0	\$0
7 Transportation Program	\$0	\$0	\$0	\$0
8 Student Activity/Field Trips	\$0	\$0	\$0	\$0
9 Interest	\$0	\$2,000	\$316	\$2,000
10 Exxon Annual Distribution	\$0	\$500	\$0	\$25,000
11 Miscellaneous 2 (unprotected cell)	\$0	\$50,000	\$0	0
12 Miscellaneous 3 (unprotected cell)	\$0	\$0	\$0	\$0
Total Other Income	\$0	\$239,964	\$168,780	\$194,000
Total All Other Income	\$0	\$347,964	\$250,780	\$323,500
Other Income, Non-Traditional				
1. Released from Restrictions	\$0	\$0	\$0	\$0
<i>The first three columns of the "Total School Income" must be entered manually and are unprotected.</i>				
TOTAL SCHOOL INCOME	\$0	\$1,233,495	\$1,278,953	\$1,405,400

Diocesan School & Finance Offices, 2020-2021 Budget, St. Joseph Regional School, Keene

2018-2019
Actual

2019-2020
Budget

2019-20 YE
Anticipated

2020-2021
Budget

SALARY INFORMATION

Note: All salaries should be recorded on this page including: substitute teachers, aides, extended care, pre-k, transportation, cafeteria, athletic stipends, student activities etc. In addition, there are places in this budget for all other expenses associated with these programs. Be sure to include position or grade level below for each salary. Please record **extended care teachers, athletic stipends, and student activity stipends** under the other instructional category along with the other special programs (music, librarian etc...). **Pre-k salaries** should be recorded under the primary grade Pre-K - 3 box. All salaries listed on this page will automatically post to its respective cost center on pages 6, 7, 9.

Primary Grade Pre K - 3		Intermediate Grade 4 - 6		Junior High Grade 7 - 8	
Grade Level	Salary	Grade Level	Salary	Grade Level	Salary
Pre-K Teacher	\$27,500	4th Grade	\$31,500	7th Grade/ History	\$38,343
Pre-K Aid	\$19,805	5th Grade Science	\$25,500	8th Grade English	\$33,500
Kinder Teacher	\$27,000	6th Grade/ Math	\$24,000	8th Grade/ Scienc	\$33,000
1st Grade	\$28,500	4th Grade (2)	\$40,000	Middle School Sp	\$13,000
2nd Grade	\$26,000		\$0	Middle School Fre	\$25,500
3rd Grade	\$32,500		\$0	Middle School Re	\$17,500
Elementary Religio	\$12,000		\$0		\$0
Elementary French	\$9,600		\$0		\$0
	\$0		\$0		\$0
	\$0		\$0		\$0
	\$0		\$0		\$0
	\$0		\$0		\$0
	\$0		\$0		\$0
Substitutes	\$0	Substitutes	\$0	Substitutes	\$0
	\$0		\$0		\$0
Total	\$182,905	Total	\$121,000	Total	\$160,843

Administrative		Other Instructional		Custodial & Maintenance Staff	
Title	Salary	Title	Salary	Title	Salary
Principal	\$65,000	Gym Teacher	\$15,060	Custodian	\$32,000
Finance	\$30,000	Music Teacher	\$32,500		\$0
Ex Assist	\$38,460	Library Teacher	\$11,888		\$0
	\$0	Art Teacher	\$19,500		\$0
	\$0		\$0		\$0
	\$0		\$0		\$0
	\$0		\$0		\$0
	\$0		\$0		\$0
Total	\$133,460		\$0	Total	\$32,000
Cafeteria				Transportation	
Title	Salary			Title	Salary
	\$0				\$0
	\$0				\$0
	\$0				\$0
	\$0				\$0
Total	\$0	Total	\$78,948	Total	\$0

Note: The above totals will automatically post to their respective expense accounts found on pages 6, 7, 9.

TOTAL SALARIES:

\$709,156

Diocesan School & Finance Offices, 2020-2021 Budget, St. Joseph Regional School, Keene

	2018-2019 <u>Actual</u>	2019-2020 <u>Budget</u>	2019-20 YE <u>Anticipated</u>	2020-2021 <u>Budget</u>
EXPENDITURES INSTRUCTIONAL SERVICES				
Primary Level Grades Pre-K-3				
1. Salaries (2020-21 Auto-Posts)	\$0	\$210,894	\$210,894	\$182,905
2. Professional Development	\$0	\$500	\$500	\$500
3. Supplies	\$0	\$2,000	\$2,500	\$2,500
4. Special Projects	\$0	\$235	\$235	\$235
5. Pre-K Materials & Other Pre-K	\$0	\$2,500	\$2,500	\$2,500
6. K-3 Materials/Text Books	\$0	\$1,000	\$1,000	\$1,000
Primary Subtotal	\$0	\$217,129	\$217,629	\$189,640
Intermediate Level Grades 4-6				
1. Salaries (2020-21 Auto-Posts)	\$0	\$101,843	\$101,843	\$121,000
2. Professional Development	\$0	\$500	\$750	\$750
3. Supplies	\$0	\$1,000	\$1,500	\$1,500
4. Special Projects	\$0	\$0	\$0	\$0
5. Materials/Text Books	\$0	\$2,000	\$2,000	\$2,000
Intermediate Subtotal	\$0	\$105,343	\$106,093	\$125,250
Junior High Level Grades 7-8				
1. Salaries (2020-21 Auto-Posts)	\$0	\$149,500	\$149,500	\$160,843
2. Professional Development	\$0	\$200	\$200	\$200
3. Supplies	\$0	\$2,500	\$2,500	\$2,500
4. Special Projects	\$0	\$2,000	\$200	\$200
5. Materials/Text Books	\$0	\$1,000	\$100	\$100
Junior High Level Subtotal	\$0	\$155,200	\$152,500	\$163,843
Other Instructional				
1. Salaries (2020-21 Auto-Posts)	\$0	\$108,200	\$108,200	\$78,948
2. Professional Development	\$0	\$300	\$500	\$300
3. Supplies	\$0	\$2,000	\$2,200	\$3,000
4. Special Projects	\$0	\$0	\$0	\$0
5. Materials/Text Books	\$0	\$1,000	\$1,000	\$1,000
6. Library Resources	\$0	\$0	\$0	\$0
7. Extended Care Supplies/Other	\$0	\$10,000	\$8,000	\$10,000
8. Student Activity Supplies/Other	\$0	\$200	\$200	\$200
9. Athletic Programming	\$0	\$2,000	\$2,000	\$2,000
10. Computer Equipment/Supplies	\$0	\$0	\$0	\$0
Resource Subtotal	\$0	\$123,700	\$122,100	\$95,448
Total Instructional Expense	\$0	\$601,372	\$598,322	\$574,181

Diocesan School & Finance Offices, 2020-2021 Budget, St. Joseph Regional School, Keene

	2018-2019 <u>Actual</u>	2019-2020 <u>Budget</u>	2019-20 YE <u>Anticipated</u>	2020-2021 <u>Budget</u>
EXPENDITURES, ADMINISTRATIVE SERVICES				
Salaries				
1. Administ./Office Staff Salaries	\$0	\$143,000	\$143,000	\$133,460
2. Cafeteria Salaries	\$0	\$0	\$0	\$0
2020-21 Administrative/Cafeteria Salaries Will Post From Page 5.				
Contract Services				
1. Machine/Copier/Computer Serv.	\$0	\$9,000	\$9,000	\$9,000
2. Advertising/PR	\$0	\$6,000	\$6,000	\$7,500
3. Instructional/Testing Service	\$0	\$1,800	\$1,800	\$1,800
4. Bookkeeper/Accounting Service	\$0	\$6,000	\$6,000	\$0
5. Accreditation	\$0	\$0	\$0	\$0
6. Dues/Subscription	\$0	\$3,000	\$3,000	\$3,000
7. Legal Service	\$0	\$4,000	\$4,000	\$0
Total Contract Services	\$0	\$29,800	\$29,800	\$21,300
Equipment Purchase/Repair				
1. Copier	\$0	\$8,000	\$8,000	\$9,000
2. Computer Equipment/Supplies	\$0	\$1,000	\$1,000	\$1,100
3. Office Machines	\$0	\$0	\$0	\$0
4. New Equipment/Furniture	\$0	\$0	\$0	\$0
Total Equip. Purchase/Repair	\$0	\$9,000	\$9,000	\$10,100
Benefits/Insurance				
1. Health Insurance	\$0	\$64,000	\$70,000	\$161,000
2. Dental	\$0	\$5,000	\$6,000	\$5,500
3. Life Insurance	\$0	\$1,000	\$1,000	\$1,100
4. Disability	\$0	\$1,000	\$1,000	\$1,100
5. Retirement	\$0	\$0	\$0	\$0
6. Worker's Comp., Liability, Prop.	\$0	\$49,000	\$49,000	\$54,226
7. Auto (Diocesan Insurance)	\$0	\$1,600	\$1,600	\$1,750
Total Benefits/Insurance	\$0	\$121,600	\$128,600	\$224,676
Other Administrative Services				
Note: The miscellaneous account below is unprotected. Please be specific as to what is included in this amount.				
1. Professional Development	\$0	\$0	\$0	\$0
2. Supplies	\$0	\$10,000	\$10,000	\$10,000
3. Telephone	\$0	\$2,200	\$2,200	\$2,200
4. Postage	\$0	\$2,000	\$2,000	\$5,000
5. Graduation	\$0	\$1,000	\$2,000	\$1,000
6. Medical Supplies	\$0	\$200	\$200	\$250
7. Hospitality Supplies	\$0	\$500	\$500	\$500
8. Administration Discretion	\$0	\$8,000	\$8,000	\$0
9. Social Security/Medicare (FICA)	\$0	\$47,000	\$47,000	\$66,813
10. Tuition Rebate	\$0	\$14,000	\$1,400	\$3,450
11. Employee Tuition Discount	\$0	\$14,000	\$1,400	\$84,000
12. Christmas/Staff Bonus	\$0	\$4,000	\$4,000	\$4,000
13. Cafeteria Expenses	\$0	\$0	\$0	\$0
14. Interest Expense	\$0	\$5,054	\$5,054	\$32,854
15. Finger Printing/Crim. Rec. Check	\$0	\$700	\$700	\$700
16. Other Miscellaneous (Unprotected)	\$0	\$0	\$0	\$1,000
Total Other Admin. Services	\$0	\$108,654	\$84,454	\$211,767
Total Administrative Expense	\$0	\$412,054	\$394,854	\$601,303

Diocesan School & Finance Offices, 2020-2021 Budget, St. Joseph Regional School, Keene

	<u>2018-2019</u> <u>Actual</u>	<u>2019-2020</u> <u>Budget</u>	<u>2019-20 YE</u> <u>Anticipated</u>	<u>2020-2021</u> <u>Budget</u>
EXPENDITURES, BUILDING/CAPITAL MAINTENANCE				
Salaries				
1. Custodial/Maintenance Salaries	\$0	\$32,000	\$32,000	\$32,000
2. Transportation Salaries	\$0	\$0	\$0	\$0
2020-21 Custodial/Maintenance and Transportation Salaries Will Post From Page 5.				
Contract Services				
1. Summer Labor	\$0	\$500	\$500	\$500
2. Exterminator	\$0	\$1,000	\$1,000	\$1,000
3. Fire Extinguisher	\$0	\$500	\$500	\$500
4. Fire Alarm Service	\$0	\$400	\$400	\$400
5. Snow Removal	\$0	\$3,000	\$3,000	\$3,000
6. Certification/Permit/Inspection	\$0	\$1,000	\$1,000	\$1,000
7. Floor Covering	\$0	\$2,000	\$2,000	\$2,000
8. Cleaning Service	\$0	\$3,000	\$3,000	\$3,000
9. Boiler Maintenance	\$0	\$2,000	\$2,000	\$2,000
10. Emergency Light Repairs	\$0	\$0	\$0	\$0
11. Security System	\$0	\$230	\$230	\$400
12. Asbestos Management	\$0	\$0	\$0	\$0
13. Trash Removal	\$0	\$2,000	\$2,000	\$2,500
Total Contract Services	\$0	\$15,630	\$15,630	\$16,300
Utilities				
1. Heating - Oil	\$0	\$30,000	\$25,000	\$25,200
2. Heating - Gas	\$0	\$0	\$0	\$0
3. Electricity	\$0	\$11,000	\$10,500	\$11,000
4. Water/Sewage	\$0	\$6,000	\$6,000	\$6,000
Total Utilities	\$0	\$47,000	\$41,500	\$42,200
Building/Capital Improvements				
1. Building Repairs/Improvements	\$0	\$2,000	\$2,000	\$2,500
2. Equipment/Tool Purchase	\$0	\$1,000	\$1,000	\$1,000
3. Contingency	\$0	\$0	\$0	\$0
Total Build./Capital Improv.	\$0	\$3,000	\$3,000	\$3,500
Other Building/Capital Maintenance & Transportation				
1. Supplies	\$0	\$1,000	\$1,000	\$1,000
2. Transportation Expense	\$0	\$2,000	\$2,000	\$2,000
3. Auto - All Other Expenses	\$0	\$0	\$0	\$0
4. Religious/Residence Expense	\$0	\$0	\$0	\$0
5. Miscellaneous	\$0	\$0	\$0	\$0
Total Other Build./Cap. Maint.	\$0	\$3,000	\$3,000	\$3,000
Total Building/Capital Maintenance	\$0	\$100,630	\$95,130	\$97,000

Diocesan School & Finance Offices, 2020-2021 Budget, St. Joseph Regional School, Keene

	<u>2018-2019</u> <u>Actual</u>	<u>2019-2020</u> <u>Budget</u>	<u>2019-20 YE</u> <u>Anticipated</u>	<u>2020-2021</u> <u>Budget</u>
EXPENDITURES, TUITION ASSISTANCE				
1. School Financial Assistance (5%)	\$0	\$97,000	\$97,000	\$76,050
School Financial Assistance should be at least 5% of Total Income.				
TOTAL EDUCATIONAL COST	\$0	\$1,211,056	\$1,185,306	\$1,348,534
EXPENDITURES, NON-TRADITIONAL				
Principal Payments				
1. Capital Debt - Principal Only	\$0	\$3,157	\$3,157	\$40,726
2. Operations Debt - Principal Only	\$0	\$0	\$0	\$0
Total Principal Payments	\$0	\$3,157	\$3,157	\$40,726
One Time Expenses				
1. Major Capital - Repairs/Purch.	\$0	\$0	\$0	\$0
2. Other One Time Expenses	\$0	\$0	\$0	\$0
Total One Time Expenses	\$0	\$0	\$0	\$0
Reserve Accounts				
1. Capital Imp. Escrow 2% (Posts)	\$0	\$24,670	\$24,670	\$28,108
2. Reserve Other	\$0	(\$5,388)	(\$4,970)	(\$11,968)
Total Reserve Accounts	\$0	\$19,282	\$19,700	\$16,140
The Capital Improvement Escrow represents 2% of the Total Income. Only 2020-2021 budget automatically posts.				
Total Other Expenditures	\$0	\$22,439	\$22,857	\$56,866
TOTAL COST - SCHOOL OPERATIONS	\$0	\$1,233,495	\$1,208,163	\$1,405,400
<u>ANNUAL SUMMARY</u>				
Total School Income (Posts Page 4)	\$0	\$1,233,495	\$1,278,953	\$1,405,400
Total Cost of Oper. (Posts Page 10)	\$0	\$1,233,495	\$1,208,163	\$1,405,400
Total Gain (Loss)	\$0	\$0	\$70,790	\$0
Cost Per Student	#DIV/0!	\$7,130	\$6,712	\$7,134

412 ATHOL ROAD, RICHMOND, NH 03470
CELL 732-672-7371 • HOME 603-239-4192 •

CHRISTOPHER D. SMITH

EDUCATION

[2004 - 2007] Hofstra University East Hempstead, NY
Master of Arts

- English Literature and Creative Writing
- Graduated With Honors

[1992 - 1995] Rutgers College New Brunswick, NJ
Bachelor of Arts

- English and Philosophy (double major)

PUBLICATIONS

Fiction:

--*The 41 Cent Method* (novel), Crossquarter Press, September 17, 2007.

Poetry:

--"My Heart Cannot Carry The Weight" a translation of Miguel Hernandez's poem, "Mi Corazon No Puede Con La Carga" in *Asheville Poetry Review*, Issue 14, Vol. 11, No. 1.

--"Song for T. Gray" in *The New York Quarterly*, Number 60.

--"I continue in the darkness, full of light" a translation of Miguel Hernandez's poem, "Sigo en la sombra, Lleno de luz" in *Diner*, Vol. 4, #2

--"I am fitful, Margaret" in *Buffalo Bones*, Vol. 5, No. 1.

--"Love is in an Old Shed" in *Parnassus Literary Journal*, Vol. 25, No. 2.

--"Mishima" in *Lilliput Review* #106

PROFESSIONAL MEMBERSHIPS

Association of Writers and Writing Programs

WORK EXPERIENCE

[2008-Current] University of Phoenix/Axia College
Adjunct Professor

[2004-Current] Bed Bath & Beyond Brick, NJ
Store Manager Burlington, MA

[2002-2004] Big Ed's BBQ Piscataway, NJ
General Manager

CHRISTOPHER D. SMITH

REFERENCES

Ronald Janssen	Professor at Hofstra University	516-463-5471
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Ronald.R.Janssen@hofstra.edu

Phillis Levin	Professor at Hofstra University	516-463-6299
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Phillis.m.levin@hofstra.edu

Anthony Franconero	Manager at Bed Bath & Beyond	732-476-5455
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anthonyfranconero@gmail.com

Christopher D. Smith
25 Spring Street, Hinsdale, NH 03451
603-762-8898
itwaseveningallafternoon@gmail.com

Education and Certification

Master of Arts in English Literature and Creative Writing
Graduated "With Distinction"
Hofstra University, 2007

Bachelor of Arts in English
Rutgers University, 1995

English Education Certification
Endorsement: English Education 5-12
EdID #91423
New Hampshire Board of Education

Publications: Novel, Poetry, and Translations

The 41 Cent Method: An American Oracle
Crossquarter Publishing Group, NM
Novel, 2007.

"Song for T. Gray"
The New York Quarterly, Number 60.
"Love is in an old shed"
Parnassus Literary Journal, Vol. 25, No. 2.

"I am fitful, Margaret"
Buffalo Bones, Vol. 5, No. 2.

"Mishima"
Lilliput Review, No. 106.

"My Heart Cannot Carry the Weight"
Translation of Miguel Hernandez's poem, "Mi Corazon No Puede Con La Carga"
Asheville Poetry Review, Issue 14, Vol. 11, No. 1.

"I continue in the darkness, full of light"
Translation of Miguel Hernandez's poem, "Sigo en la sombra, Lleno de luz"
Diner, Vol. 4, No.2

Professional Experience

English Literature Teacher

- St. Joseph Regional School, Keene, NH, September 2008 to present**
- Designed and wrote 8 different literature and grammar classes for different grade levels based on the classics.
 - Wrote, organized, and led the drive to unify the entire school's curriculum.
 - Created a student run annual literary magazine.
 - Advisor to student council and chess club
 - Integrated and installed updated technological solutions throughout the building.

Store Manager

Bed Bath & Beyond, NJ, NH, and MA, December 2004 to September 2008

- Completely in charge of a multimillion dollar "A" volume big box retailer.
- Developed initiatives, training methods and scheduling for more than 75 employees on a daily basis.
- Implemented and followed programs and policies handed down from Corporation central.
- Responsible for entire interviewing, hiring, assessment, and firing processes.

General Manager

B. E. Barbecue, South Plainfield, NJ, 2002-2004

General Manager

Grill Concepts/ Uno Chicago Bar & Grill, South Plainfield, NJ, 1996-2002

JENNIFER S. MARSHALL

256 North Shore Road, Munsonville, NH, 03457 • mobile: 412.996.0482 • email: jenmarshall.nh@gmail.com

EMPLOYMENT HISTORY

NEW HAMPSHIRE DANCE INSTITUTE (NHDI) | Keene, NH

Dec 2015 to June 2019

Executive Director – Provided clear and steady leadership of NHDI, a 33-year-old nonprofit arts education outreach organization, promoting a culture consistent with the mission, vision and core values of the organization.



- Reported directly to the Board of Directors, maintaining close communications with all members and managing monthly full Board, standing and ad hoc subcommittee meetings.
- Led strategic planning process, and implementation of five-year strategic plan.
- Oversaw all fiscal matters for the continued maintenance of current operations and future solvency of the organization, which included programmatic revenue generation, annual/major gift fundraising, grant writing, and business partnerships.
- Engaged in public relations with local/state media, managed/updated robust web site and social media accounts, and marketed all programs.
- Developed/maintained positive collaborative relationships with parents, school administrators, community partners, and volunteers.
- Oversaw all event planning operations of the NHDI Event of the Year (four annual performances with 2,000+ attendees), Summer Intensive camp/performances, pep rally, and 5K race.
- Partnered closely with the Artistic Director on NHDI programmatic implementation, ensuring positive educational experiences for all students.
- Directed 10+ part-time staff/independent contractors and 50+ volunteers; supervised all administrative duties, regularly managing/assigning tasks to administrative assistant.
- Served as liaison and primary contact with National Dance Institute (NDI) in New York.

INTERNATIONAL BASKETBALL FEDERATION (FIBA) | Geneva, Switz.

Oct 2003 to Sept 2004

Marketing Manager – Planned and directed a broad range of FIBA activities in preparation for and throughout the 2004 Athens Olympics, and guided global sponsor action to solidify and further grow sponsor commitments.



- Managed all of FIBA's operations and events for the 2004 Athens Summer Olympic Games including: Referee and Official nominations, travel, budget and uniforms; FIBA Central Board events and schedules; Olympic accreditations and passes; ticket allocation and distribution (including global member federations' tickets); FIBA office and logistics in the Hellinikon Indoor Arena / Olympic Hall; all aspects of FIBA global sponsor luncheons and special events (150+ attendees per event including IOC and NBA dignitaries).
- Directed FIBA's Adecco global sponsorship, including the FIBA-Adecco career program providing counseling to former professional basketball players and coaches throughout Europe.
- Coordinated global sponsorship integration at competitions to best leverage sponsors' relationship with FIBA.
- Sponsorship activities: crafted content and language for sponsorship proposals; prepared post-event reports.
- Marketing: Set marketing guidelines for global competitions; wrote articles for *FIBA Assist* magazine; managed budget/invoicing for all marketing, television, Research & Study Center, and special events.
- Participated in preparations and local organizing committee negotiations for the 2006 FIBA World Cup in Japan.

UNIVERSITY OF DAYTON DIVISION OF ATHLETICS | Dayton, OH

Aug 1998 to May 2003

Assistant Athletics Director/Communications – Oversaw all public and media relations activities of the Athletics Division and served as a member of Division's senior management team and marketing management group.



- Managed all external public and media relations communications for University of Dayton Athletics Division.
- Led the design and installation of all digital and printed graphics at the UD Arena Donohue Basketball Center.
- Primary department contact and coordinator for all fund-raising and corporate partner activities, including major gift and sponsorship proposals (communications, and contract negotiations).
- Supervised four full-time and 10 part-time staff members; managed \$300k athletics communication budget.

Director of Sports Publicity/Technology – Directed all publications production and technology integration for the Athletics Division public and media relations activities.

- Managed all aspects for the publication of 17 sports' media guides, including managing external graphics design agencies and printers for materials (books, website content and on-site environmental graphics).

- Managed complete redesign and on-going content of UD Athletics web site (<http://www.DaytonFlyers.com>).
- Developed and produced the *Flyer Insider* newsletter for communication with donors and season ticket holders.
- Primary media relations contact for the women's basketball program.
- Coordinated media activities for the 2001/2002/2003 NCAA Div. I Men's Basketball Tournament games at UD Arena, 2003 NCAA Div. I Women's Basketball Regional, and numerous Atlantic 10 Conference Championships.

GEORGETOWN UNIVERSITY | Washington, DC

Aug 1995 to Aug 1998

Assistant Director for Communications, Hoyas Unlimited / Athletics Development – Handled all communication efforts of Hoyas Unlimited, Georgetown's Athletics Annual Fund, to maintain close contact with alumni and benefactors.



- Created and produced all athletics development marketing materials.
- Developed and maintained Hoyas Unlimited athletics website.
- Managed design, layout, content, printing and distribution of *Hoya Saxa* and 16 sport club newsletters.

Development Assistant for Athletics – Coordinated major donor development efforts for Georgetown Athletics.

- Wrote, researched and edited all major donor proposals.
- Cultivated and stewarded all major gifts to Athletics and associated donor relationships.
- Planned and coordinated special events for Athletics prospects and donors. Orchestrated all development visits for the director of development for athletics, coaches and senior athletic department administrators.
- Managed Athletics donor recognition and acknowledgement process.

Executive Assistant, MBNA Career Education Center – Guided marketing, alumni and employer relations career activities to educate students about their future professional opportunities.

- Provided all aspects of administrative support to Executive Director and Associate Executive Director.
- Responsible for all career programs/services marketing to publicize career education activities to the students.
- Led Career Spotlight and Alumni Connections publications and events to engage alumni with current students.
- Cultivated and managed employer development efforts to expand/diversify employer student recruitment.

WILLIAMS & CONNOLLY LLP | Washington, DC

Aug 1993 to Aug 1995

Paralegal - Performed a wide range of responsibilities in the commercial litigation, medical malpractice and campaign finance areas of one of DC's most prestigious law firms, for clients such as Southeast Toyota Distributors and Georgetown University Medical Center.

WILLIAMS & CONNOLLY LLP

- Assisted in all facets of discovery; proofread motions and briefs; prepared and responded to interrogatories.
- Organized and maintained extensive libraries of evidentiary documents; managed document productions to opposing counsels.
- Scheduled and attended witness interviews and depositions.
- Established trial support facilities and prepared computer, audio-visual equipment and exhibits for use at trial.

OFFICE OF U.S. CONGRESSMAN WILLIAM LIPINSKI | Washington, DC

July 1992 to Aug 1993

Legislative Correspondent – Managed congressman's communication with constituents on all legislative matters.

- Responsible for congressman's responses to all types of constituent inquiries.
- Wrote or edited all press releases, Dear Colleagues communications, Congressional and Presidential greetings, Congressional Record extensions of remarks, constituent newsletters, and Executive Branch correspondence.
- Maintained constituent database and produced direct mailings.



EDUCATION & PROFESSIONAL DEVELOPMENT

UNIVERSITY OF NOTRE DAME, South Bend, IN

Bachelor of Arts, Cum Laude, Economics, Concentration in Government.

GEORGETOWN UNIVERSITY, Washington, DC

Certificate in Editing and Publications – Included coursework in public relations, promotional writing, copyediting, proofreading and graphic design.

UNIVERSITY OF DAYTON, Center for Leadership and Executive Development, Dayton, OH

The Heart of Coaching (T. Crane); Four Roles of a Leader: How to Make Every Team Player a Leader (S. Covey)

AMERICAN MANAGEMENT ASSOCIATION, New York, NY

Management Skills for New Managers

LIBRARY OF CONGRESS CONGRESSIONAL RESEARCH SERVICE, Washington, DC

Legislative Institute Seminar; House of Representatives Advanced Legislative Process Series.

U.S. SENATE BANKING, HOUSING AND URBAN AFFAIRS COMMITTEE, Washington, DC

Intern – Assisted in preparation for all committee mark-ups and hearings.

Andrew J Cardine

Swanzey, NH 03446 - meandeac@gmail.com - 802.258.1738
<https://www.linkedin.com/in/andy-cardine-5878b819/>

Mechanical Engineer - Facilities/Plant Operating Systems Engineer - Project Engineer

- Innovative Engineer possessing diverse experience acquired in progressive roles in all engineering aspects of power plants including design projects, risk mitigation, process improvement and decommissioning.
- Inherently qualified as a full-time, consultant or contract project leader leveraging technical knowledge and cross-functional management skills to reach the targeted goals of a business or enterprise.
- Extensive project and program management experience fashioned from needs prioritization, solutions design and implementation, and post-action analysis and mapping.

Core Competencies & Skills

Project Management - Engineering Consulting - Process Analysis & Testing - Collaborative Team Leadership
Team Training & Development - Resource Forecasting & Acquisition - Client Communication & Presentations
Risk Identification & Elimination - Cost/Budget Adherence - Process Improvement - Change Management
Strategic Relationship Development - Plan Design & Implementation - Decommissioning Programs/Facilities

Notable Achievements

Performed corporate governance and oversight of the decommissioning planning processes for the Pilgrim Nuclear station shutdown from operation to preparation for sale to new buyer. Developed and executed project controls and risk management tools to direct the activities of multi-department site and corporate team. Managed decommissioning transition of the facility and transfer of the site and remaining personnel to a new owner.

Based upon corporate decision to shut down multiple nuclear facilities due to market conditions, designed framework for multiple site decommissioning planning efforts. Assembled a multi-faceted team for the project, developed and prioritized actions. Generated key documents for corporate organization to govern and oversee the processes, mapping action items and schedule. Successful project initiative led to offer from organization.

Professional Experience

Entergy Wholesale Commodities (EWC), Nuclear Decommissioning Organization (NDO) - Brattleboro, VT

Engineering Supervisor (Decommissioning Program Planning & Execution, 2015-2020)

- Core member of the program team responsible for the development of Entergy's 5-year strategic roadmap for EWC's divestiture of its nuclear assets.
- Contract Manager for multi-million-dollar decommissioning project scopes, oversaw the development and deployment of the nuclear decommissioning program for Entergy's unregulated nuclear fleet.
- Engineering consultant for in-flight engineering products across five decommissioning sites.
- Led the development of organization structures, GOES models, and project controls for the corporate and site teams focused upon decommissioning planning.
- Selected as the primary customer facing role for the program at the Pilgrim Nuclear Power station, generating strategic business relationships and presenting critical program attribute status to executive management.
- Led corporate and site-based teams to develop, manage, and execute project plans.

Entergy Nuclear Vermont Yankee - Vernon, VT

Engineering Lead, Decommissioning Planning/Project Implementation (2013-2015)

- Developed and managed Engineering Department's Decommissioning Project Plan which included plant design changes, regulatory filings, and procedure/process changes.
- Piloted lessons learned program documentation for future decommissioning efforts.
- Designed and implemented Decommissioning Project Controls to include Risk/Issue Management and Change Management.

Andrew J. Cardine

Acting System Engineering Manager (2012-2013)

- Fashioned a solid record of advancement from entry level engineer to multiple management positions through the successful completion of increasingly complex assignments and effective management of staff.
- Managed a department of 5 Engineering Supervisors and 29 Engineers to achieve core business and strategic plan objectives.
- Led the development and implementation of plant and fleet business plan initiatives.

System Engineering Supervisor (2008-2013)

- Supervised an engineering team of 13 to improve short- and long-range reliability of nuclear power station mechanical systems.
- Managed the elements of multi-million-dollar long range capital improvement plan and oversaw the development of the associated business cases.
- Established cross-functional engineering coverage for emergent plant events and for emergency planning scenarios.
- Led causal analysis teams in establishing root and apparent causes of events and the development of subsequent corrective actions to prevent recurrence.

Department Performance Improvement Coordinator (2006-2008)

- Developed and analyzed trends across engineering departments for common cause identification and human performance improvements.

Diversity and Inclusion Council Member (2005-2007)

- Engineering representative on a cross department team established to support employee development and engagement in the workplace.

System Engineer (2002-2008)

- Positioned as a nuclear plant engineer in charge of multiple plant systems including closed cooling water systems, treated water systems, and control rod drive system.
- Functioned as project coordinator and contract manager for control rod drive replacement and refurbishment.
- Instituted multiphase project for improved filter demineralizer performance to take reactor vessel chemistry performance to industry leading performance.

Education - Professional & Technical Training - Software Skills

Bachelor of Science (B.S.), Mechanical Engineering - University of Pittsburgh; Pittsburgh, PA

-Honors College Scholarship and Fessenden-Trott Engineering Honors Scholarship recipient

-Graduated Magna Cum Laude

Kepner-Tregoe (Decision Analysis & Causal Analysis) • Apparent Cause & Root Cause Training (Corrective Action)
Pacific Institute (Self-Management) • Critical Communications (Conflict Resolution) • MARC (Labor Relations)
INPO First Line Leaders (Supervisor Development) • INPO Emerging Leaders (Senior Management Development)

Microsoft Office Suite (Word, Excel, PowerPoint, Outlook) - PCRS (Corrective Action Tracking)

Indus Asset Suite (Integrated Work Management) - ESOMS (Protective Tagging)

Merlin (Electronic Document Management) - Insert Key Solutions (System and Component Health)

Crystal Reports (Data Query and Reporting)

Community Service Experience

Destination Imagination (Youth Creative Problem Solving); Appraiser, Coach, Parent Volunteer

2004 – Present

Chelsea C. Schuster

2506 Boulder Springs Ct. Columbia, MO 65201
chelseacmf24@gmail.com | (573) 480-7100

Objective

Connect youth with Jesus Christ by fostering their relationship with Him through Catholic Formation and Education.

Ministry Experience

Campus Minister & Theology Teacher at Fr. Tolton Catholic High School, Columbia, Missouri (2017-present)

- Established and directed student run youth ministry styled retreats personalized by grade level that communicated themes of faith community building, relationships, servant leadership, and living the universal call to holiness
- Built relational ministry between students as well as between the faculty and staff
- Orchestrated faith sharing prayer experiences and relatable catechetical lessons for the faculty and students.
- Organized Eucharistic Adoration days and evening experiences with speakers, live music, and Reconciliation.
- Created curriculum for Old and New Testament Scripture courses, animated by experiential learning, varied prayer styles (ie: Lectio Divina, Rosary, Ignatian Contemplation), skits, and small group discussion

Youth Director at Sacred Heart & St. Thomas More Newman Center, Columbia, Missouri (2014-2017)

- Developed two semesters of curriculum for biweekly Confirmation class of 40 high school juniors and seniors. Based on the Decision Point program and varied traditional forms of Catholic devotions
- Planned and animated weekly High School Life Nights for the tri-parish youth ministry program. Based on the Life Teen model, emphasis on Catholic community via small groups and relational ministry beyond Life Nights
- Directed all activities of annual weekend retreat for high school students. Retreat included daily Mass, Eucharistic Adoration, Reconciliation, Liturgy of the Hours, Catholic catechesis, and witness talks
- Built relational ministry between the ministry staff, core team, and students
- Oversaw the underclassman team activities during the annual Luke 18 retreat for incoming high school students

Director of Camp Siena, Diocesan Camp for high school girls, Jefferson City Diocese, Missouri (2016)

- Created camp theme, curriculum, and schedule for 60 people
- Directed all camp activities. Included witness and catechetical talks, prayer moments, small group discussions, participation in the Sacraments, Eucharistic Adoration, and physical activities
- Recruited session speakers and prayer moment leaders. Steered preparations for talks and prayer moments

Religious Formation, Salesian Sisters of St. John Bosco, North Haledon, New Jersey & Bellflower, California (2012-2014)

- Lived the rhythm of Religious Life in prayer and in works for the young and the poor
 - Taught Religious Education (8th grade) and Sacramental Preparation (5th grade)
 - Led weekly workshop in the Festive Oratory program and mentored students (K to 7th grade)
 - Engaged summer campers and counselors in gym and outdoor activities (1st grade to college)
- Studied in the Salesian tradition, including pastoral theology in multicultural parish and school settings, Liturgy, History of the Founders and of the Institute, and Italian

Youth Director at St. Joseph Catholic Church, Palmyra, Missouri (2010-2012)

- Created and taught curriculum for weekly High School Youth Nights. Based on the four parts of the Catechism of the Catholic Church, with special focus on the Theology of the Body
- Developed Confirmation curriculum (10th to 12th grade)
- Planned and animated biweekly Middle School Youth Nights. Based on the Eight Components of a Comprehensive Youth Ministry Program outlined by the USCCB
- Directed the Religious Education program (1st to 10th grades) and Vacation Bible School

Education

Benedictine College, Atchison, Kansas

- Dual Bachelor's degrees in Theology and in Youth Ministry (May 2010)

Business Information

Business Details

Business Name:	ROMAN CATHOLIC BISHOP OF MANCHESTER	Business ID:	64241
Business Type:	Domestic Nonprofit Corporation	Business Status:	Good Standing
Business Creation Date:	03/07/1901	Name in State of Incorporation:	Not Available
Date of Formation in Jurisdiction:	03/07/1901		
Principal Office	153 Ash St PO Box 310, Address: Manchester, NH, 03105, USA	Mailing Address:	NONE
Citizenship / State of Incorporation:	Domestic/New Hampshire		
		Last Nonprofit Report Year:	2015
		Next Report Year:	2020
Duration:	Perpetual		
Business Email:	NONE	Phone #:	NONE
Notification Email:	NONE	Fiscal Year End Date:	NONE

Principal Purpose

S.No	NAICS Code	NAICS Subcode
1	OTHER / RELIGIOUS ORGANIZATION	

Page 1 of 1, records 1 to 1 of 1

Principals Information

Name/Title	Business Address
Francis Christian / Other Officer	153 Ash Street Po Box 310, Manchester, 03105, USA
Diane Murphy Quinlan / Other Officer	153 Ash Street, Manchester, 03105, USA
Peter A. Libasci / Director	153 Ash Street PO Box 310, Manchester, 03105, USA
Guy D. Chapdelaine / Other Officer	153 Ash Street PO Box 310, Manchester, 03104, USA

Page 1 of 1, records 1 to 4 of 4

Registered Agent Information

Name: Not Available

Registered Office Not Available

Address:

Registered Mailing Not Available

Address:

HOLY TRINITY SCHOOL Active
 (/online/BusinessInquire/TradeNameInformation? 801783
 businessID=627829)

BISHOP BRADY HIGH SCHOOL Active
 (/online/BusinessInquire/TradeNameInformation? 816608
 businessID=644646)

SAINT MARY ACADEMY Rejected
 (/online/BusinessInquire/TradeNameInformation? 820458
 businessID=648495)

ST. ANDRE BESSETTE PARISH Active
 (/online/BusinessInquire/TradeNameInformation? 820706
 businessID=648743)

Trade Name Owned By

Name	Title	Address
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Trademark Information

Trademark Number	Trademark Name	Business Address	Mailing Address
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No records to view.

[Filing History](#)
 [Address History](#)
 [View All Other Addresses](#)
 [Name History](#)
[Shares](#)
[Businesses Linked to Registered Agent](#)
[Return to Search](#)
[Back](#)

NH Department of State, 107 North Main St. Room 204, Concord, NH 03301 -- [Contact Us](#)
[\(/online/Home/ContactUS\)](#)

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Business Information

Business Details

Business Name:	ST. JOSEPH REGIONAL CATHOLIC SCHOOL	Business ID:	777371
Business Type:	Trade Name	Business Status:	Active
Expiration Date:	8/21/2022	Last Renewal Date:	Not Available
Business Creation Date:	08/21/2017	Name in State of Formation:	Not Available
Date of Formation in Jurisdiction:	08/21/2017		
Principal Office Address:	40 Main Street, Salem, NH, 03079, USA	Mailing Address:	40 Main Street, Salem, NH, 03079, USA
Business Email:	dquinlan@rcbm.org	Phone #:	603-669-3100
Notification Email:	NONE	Fiscal Year End Date:	NONE

Principal Purpose

S.No	NAICS Code	NAICS Subcode
1	OTHER / Roman Catholic School for Grades Pre K-8	

Page 1 of 1, records 1 to 1 of 1

Trade Name Information

Business Name	Business ID	Business Status
---------------	-------------	-----------------

Trade Name Owned By

Name	Title	Address
ROMAN CATHOLIC BISHOP OF MANCHESTER (/online/BusinessInquire/TradeNameInformation?businessID=34356)	Business	Good Standing

Business Name	Business ID	Business Status
CHOWDER FESTIVAL OF GREATER MANCHESTER (/online/BusinessInquire/TradeNameInformation? businessID=109474)	380949	Expired
JOBLINK ASSOCIATES (/online/BusinessInquire/TradeNameInformation? businessID=312952)	167593	Expired
Saint Benedict Academy (/online/BusinessInquire/TradeNameInformation? businessID=450901)	631852	Active
Parish of the Holy Spirit (/online/BusinessInquire/TradeNameInformation? businessID=460093)	636749	Active
Sacred Heart School (/online/BusinessInquire/TradeNameInformation? businessID=476447)	656021	Active
Trinity High School (/online/BusinessInquire/TradeNameInformation? businessID=480001)	648709	Active
CHRIST THE KING PARISH (/online/BusinessInquire/TradeNameInformation? businessID=482687)	654109	Active
ST. JOSEPH REGIONAL CATHOLIC SCHOOL (/online/BusinessInquire/TradeNameInformation? businessID=602416)	777371	Active
ST. THERESA PARISH (/online/BusinessInquire/TradeNameInformation? businessID=606172)	781127	Active
ST. ANTHONY OF PADUA PARISH (/online/BusinessInquire/TradeNameInformation? businessID=608072)	782028	Active
ST. FRANCIS OF ASSISI PARISH (/online/BusinessInquire/TradeNameInformation? businessID=614653)	788607	Active
SAINT KATHRYN CHURCH (/online/BusinessInquire/TradeNameInformation? businessID=618351)	792305	Active

Internal Revenue Service
P.O. Box 2508
Cincinnati, OH 45201

Department of the Treasury

Date: October 24, 2018

Person to Contact:

R. Meyer ID# 0110429

Toll Free Telephone Number:

877-829-5500

United States Conference of Catholic
Bishops
3211 4th Street, NE
Washington, DC 20017-1194

Group Exemption Number:

0928

Dear Sir/Madam:

This responds to your October 12, 2018, request for information regarding the status of your group tax exemption.

Our records indicate that you were issued a determination letter in March 1946, that you are currently exempt from federal income tax under section 501(c)(3) of the Internal Revenue Code, and are not a private foundation within the meaning of section 509(a) of the Code because you are described in sections 509(a)(1) and 170(b)(1)(A)(i).

With your request, you provided a copy of the *Official Catholic Directory for 2018*, which includes the names and addresses of the agencies and instrumentalities and the educational, charitable, and religious institutions operated by the Roman Catholic Church in the United States, its territories, and possessions that are subordinate organizations under your group tax exemption. Your request indicated that each subordinate organization is a non-profit organization, that no part of the net earnings thereof inures to the benefit of any individual, and that no substantial part of their activities is for promotion of legislation. You have further represented that none of your subordinate organizations is a private foundation under section 509(a), although all subordinates do not all share the same sub-classification under section 509(a). Based on your representations, the subordinate organizations in the *Official Catholic Directory for 2018* are recognized as exempt under section 501(c)(3) of the Code under GEN 0928.

Donors may deduct contributions to you and your subordinate organizations as provided in section 170 of the Code. Bequests, legacies, devises, transfers, or gifts to them or for their use are deductible for federal estate and gifts tax purposes if they meet the applicable provisions of section 2055, 2106, and 2522 of the Code.

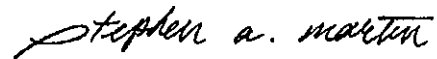
Subordinate organizations under a group exemption do not receive individual exemption letters. Subordinate organizations are not listed in Tax Exempt Organization Search (Pub 78 data), and many are not listed in the Exempt Organizations Business Master

File extract, or EO BMF. Donors may verify that a subordinate organization is included in your group exemption by consulting the *Official Catholic Directory*, the official subordinate listing approved by you, or by contacting you directly. IRS does not verify the inclusion of subordinate organizations under your group exemption. See IRS Publication 4573, *Group Exemption*, for additional information about group exemptions.

Each subordinate organization covered in a group exemption should have its own EIN. Each subordinate organization must use its own EIN, not the EIN of the central organization, in all filings with IRS.

If you have any questions, please call us at the telephone number shown in the heading of this letter.

Sincerely,

A handwritten signature in cursive script that reads "Stephen A. Martin".

Stephen A. Martin
Director, Exempt Organizations
Rulings and Agreements

**Internal Revenue Service
P.O. Box 2508
Cincinnati, OH 45201**

Department of the Treasury

Date: October 24, 2018

Person to Contact:

R. Meyer ID# 0110429

Toll Free Telephone Number:

877-829-5500

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Bishops
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Donors may deduct contributions to you and your subordinate organizations as provided in section 170 of the Code. Bequests, legacies, devises, transfers, or gifts to them or for their use are deductible for federal estate and gifts tax purposes if they meet the applicable provisions of section 2055, 2106, and 2522 of the Code.

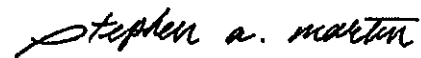
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A handwritten signature in cursive script that reads "Stephen A. Martin".

Stephen A. Martin
Director, Exempt Organizations
Rulings and Agreements



Office of the General Counsel

3211 FOURTH STREET, NE • WASHINGTON, DC 20017-1194 • 202-541-3300 • FAX 202-541-3337

December 6, 2018

TO: Subordinate Organizations under USCCB Group Ruling (GEN: 0928)

SUBJECT: 2018 Group Ruling

FROM: Anthony Picarello, General Counsel *APP*

This memorandum relates to the annual Group Ruling determination letter issued to the United States Conference of Catholic Bishops ("USCCB") by the Internal Revenue Service ("IRS"), the most recent of which is dated October 24, 2018, with respect to the federal tax status of subordinate organizations listed in the 2018 edition of the Official Catholic Directory ("OCD").¹ As explained in greater detail below, this 2018 Group Ruling determination letter is important for establishing:

- (1) exemption of subordinate organizations under the USCCB Group Ruling from federal income tax; and
- (2) deductibility of contributions to such organizations for federal income, gift, and estate tax purposes.

The 2018 Group Ruling determination letter is the latest in a series that began with the original determination letter of March 25, 1946. In the original 1946 letter, the Treasury Department affirmed the exemption from federal income tax of all Catholic institutions listed in the OCD for that year. Each year since 1946, in a separate letter, the 1946 ruling has been reaffirmed with respect to subordinate organizations listed in the current edition of the OCD.² The annual group ruling letter clarifies important tax consequences for Catholic institutions listed in the OCD, and should be retained for ready reference. Group Ruling letters from prior years establish tax consequences with respect to transactions occurring during those years.

UBIT on Fringe Benefits. Public Law 115-97, introduced as the "Tax Cuts and Jobs Act" and signed by President Trump on December 22, 2017, added section 512(a)(7) to the Internal Revenue Code ("Code"), which subjects tax-exempt organizations to unrelated business income tax ("UBIT") to the extent they pay or incur expenses for any qualified transportation fringe described in section 132(f) and any parking facility used in connection with qualified parking. The new tax applies to "amounts paid or incurred after December 31, 2017." Because of this, it

¹ A copy of the most recent Group Ruling determination letter and this memo may be found on the USCCB website at www.usccb.org/about/general-counsel/ under "Tax and Group Ruling."

² Catholic organizations with independent IRS exemption determination letters are listed in the 2018 OCD with an asterisk (*), which indicates that such organizations are **not** included in the Group Ruling.

is anticipated that many Group Ruling organizations will have to file a tax return, Form 990-T, even if they do not engage in any unrelated trade or business activities.

An organization's Form 990-T is due on the 15th day of the 5th month after the end of its taxable year. If an organization has a June 30 year end, its Form 990-T is due on November 15. If it has a December 31 year end, its Form 990-T is due on May 15. Organizations are also required to make installment payments of estimated UBIT if their estimated tax (minus allowable credits) is expected to be \$500 or more. Please consult a local tax advisor about any questions concerning Form 990-T, estimated tax payments, or section 512(a)(7).

Responsibilities under Group Ruling. Diocesan officials who compile OCD information for submission to the OCD publisher are responsible for the accuracy of such information. They must ensure that only qualified organizations are listed, that organizations are listed under their correct legal names, that organizations that cease to qualify are deleted promptly, and that newly-qualified organizations are listed as soon as possible.

EXPLANATION

1. **Exemption from Federal Income Tax.** The latest Group Ruling determination letter reaffirms that the agencies and instrumentalities and educational, charitable, and religious institutions operated, supervised or controlled by or in connection with the Roman Catholic Church in the United States, its territories or possessions that appear in the 2018 OCD and are subordinate organizations under the Group Ruling are recognized as exempt from federal income tax and described in section 501(c)(3) of the Code. The Group Ruling determination letter does not cover organizations listed with asterisks or any foreign organizations listed in the 2018 OCD.

Verification of Exemption under Group Ruling. The latest Group Ruling determination letter indicates that subordinate organizations are not listed in Tax Exempt Organization Search (Pub. 78 data) ("TEOS," formerly "EO Select Check), and many are not listed in the Exempt Organizations Business Master File extract, or EO BMF . As a result, many subordinate organizations included in the USCCB Group Ruling are not included in various online databases (e.g., GuideStar) that are derived from the EO BMF. This does not mean that subordinate organizations included in the Group Ruling are not tax exempt, that contributions to them are not deductible, or that they are not eligible for grant funding from corporations, private foundations, sponsors of donor-advised funds or other donors that rely on online databases for verification of tax-exempt status. It does mean that a Group Ruling subordinate may have to make an extra effort to document its eligibility to receive charitable contributions. The Group Ruling determination letter states that donors may verify that a subordinate organization is included in the Group Ruling by consulting the Official Catholic Directory or by contacting the USCCB directly. It also states that the IRS does not verify inclusion of subordinate organizations under the Group Ruling. *Accordingly, neither subordinate organizations nor donors should contact the IRS to verify inclusion under the Group Ruling.*

Subordinate organizations should refer donors, including corporations, private foundations, and sponsors of donor-advised funds, to the specific language in the Group Ruling determination letter regarding verification of tax-exempt status and to IRS Publication 4573,

Group Exemptions, available on the IRS website at www.irs.gov.³ Publication 4573 explains that: (1) the IRS does not determine which organizations are included in a group exemption; (2) subordinate organizations exempt under a group exemption do not receive their own IRS determination letters; (3) exemption under a group ruling is verified by reference to the official subordinate listing (e.g., the Official Catholic Directory); and (4) it is not necessary for an organization included in a group exemption to be listed in TEOS or the EO BMF. Although not required, organizations in the Group Ruling may be included in the EO BMF, and consequently, online databases derived from it.

2. **Public Charity Status.** The latest Group Ruling determination letter recognizes that subordinate organizations included in the 2018 OCD are public charities and not private foundations under section 509(a) of the Code, but that all subordinate organizations do not share the same public charity status under section 509(a). Therefore, although the USCCB is classified as a public charity under sections 509(a)(1) and 170(b)(1)(A)(i), that public charity status does *not* automatically extend to subordinate organizations covered under the Group Ruling.

Verification of Public Charity Status. Each subordinate organization in the Group Ruling must establish its own public charity status under section 509(a)(1), 509(a)(2), or 509(a)(3) as a condition to inclusion in the Group Ruling. Certain types of subordinate organizations included in the Group Ruling qualify as public charities by definition under the Code. These are:

- churches and conventions or associations of churches under sections 509(a)(1) and 170(b)(1)(A)(i) (generally limited to dioceses, parishes and religious orders);
- elementary and secondary schools, colleges and universities under sections 509(a)(1) and 170(b)(1)(A)(ii); and
- hospitals under sections 509(a)(1) and 170(b)(1)(A)(iii).

Other subordinate organizations covered under the Group Ruling may qualify under the public support tests of either sections 509(a)(1) and 170(b)(1)(A)(vi) or section 509(a)(2). Verification of public charity classification under either of the support tests generally can be established by providing a written declaration of the applicable classification signed by an officer of the organization, along with a reasoned written opinion of counsel and a copy of Schedule A of Form 990/EZ, if applicable. Large institutional donors, such as private foundations and sponsors of donor-advised funds, may require this verification prior to making a contribution or grant to be assured that the grantee is not a Type III non-functionally integrated supporting organization.⁴ A subordinate organization included in the Group Ruling may want to file Form 8940, Request for Miscellaneous Determination, with the IRS to request a determination that it is a publicly supported charity described in sections 509(a)(1) and 170(b)(1)(A)(vi) or section 509(a)(2), or is a Type I or II supporting organization, in order to satisfy private foundations and

³ For an illustration of how exemption verification works, refer to Information for Donors and Grantmakers on the USCCB website at www.usccb.org/about/general-counsel/ under “Tax and Group Ruling.”

⁴ See Notice 2014-4, 2014-2 I.R.B. (January 6, 2014).

sponsors of donor-advised funds regarding its public charity status.

3. **Deductibility of Contributions.** The latest Group Ruling determination letter assures donors that contributions to subordinate organizations listed in the 2018 OCD are deductible for federal income, gift, and estate tax purposes.

4. **Unemployment Tax.** As section 501(c)(3) organizations, subordinate organizations covered by the Group Ruling are exempt from *federal* unemployment tax. However, individual states may impose unemployment tax on subordinate organizations even though they are exempt from federal unemployment tax. Please consult a local tax advisor about any state unemployment tax questions.

5. **Social Security Tax.** All section 501(c)(3) organizations, including churches, are required to withhold and pay taxes under the Federal Insurance Contributions Act (FICA) for each employee.⁵ However, services performed by diocesan priests in the exercise of their ministry are not considered “employment” for FICA (Social Security) purposes.⁶ FICA should not be withheld from their salaries. *For Social Security purposes*, diocesan priests are subject to self-employment tax (“SECA”) on their salaries as well as on the value of meals and housing or housing allowances provided to them.⁷ Neither FICA nor income tax withholding is required on remuneration paid directly to religious institutes for members who are subject to vows of poverty and obedience and are employed by organizations included in the Official Catholic Directory.⁸

6. **Federal Excise Tax.** Inclusion in the Group Ruling has no effect on a subordinate organization's liability for federal excise taxes. Exemption from these taxes is very limited. Please consult a local tax advisor about any excise tax questions.

7. **State/Local Taxes.** Inclusion in the Group Ruling does not automatically establish a subordinate organization's exemption from state or local income, sales, or property taxes. Typically, separate exemptions must be obtained from the appropriate state or local tax authorities in order to qualify for any applicable exemptions. Please consult a local tax advisor about any state or local tax exemption questions.

8. **Form 990/EZ/N.** All subordinate organizations included in the Group Ruling must file Form 990, Return of Organization Exempt from Income Tax, Form 990-EZ, Short Form Return of Organization Exempt From Income Tax, or Form 990-N, e-Postcard, *unless* they are eligible for a mandatory or discretionary exception to this filing requirement. ***There is no automatic exemption from the Form 990/EZ/N filing requirement simply because an organization is included in the Group Ruling or listed in the OCD.*** Subordinate organizations

⁵ Section 3121(w) of the Code permits certain church-related organizations to make an irrevocable election to avoid payment of FICA taxes, but only if such organizations are opposed for religious reasons to payment of social security taxes.

⁶ I.R.C. § 3121(b)(8)(A).

⁷ I.R.C. § 1402(a)(8).

⁸ Rev. Rul. 77-290, 1977-2 C.B. 26. *See also* OGC/LRCR Memorandum on Compensation of Religious, (September 11, 2006).

must use their own EIN to file Form 990/EZ/N. **Do not** use the EIN of the USCCB or an affiliated parish, diocese or other organization to file a return. Form 990/EZ/N is due by the 15th day of the fifth month after the close of an organization's fiscal year.⁹ The following organizations are not required to file Form 990/EZ/N: (i) churches and conventions or associations of churches; (ii) integrated auxiliaries;¹⁰ (iii) the exclusively religious activities of religious orders; and (iv) schools below college level affiliated with a church or operated by a religious order.¹¹ Organizations should exercise caution if they choose not to file a Form 990/EZ/N because they believe they are not required to do so. If IRS records indicate that the organization should file a Form 990/EZ/N each year (for example, the organization receives an IRS notice stating that it failed to file a return for a given year), then the organization may appear on the auto-revocation list notwithstanding its claim to being exempt from the filing requirement.

Which form an organization is required to file usually depends on the organization's gross receipts or the fair market value of its assets.

Gross receipts or fair market value of assets	Return required
Gross receipts normally not more than \$50,000 (regardless of total assets)	990-N (but may file a Form 990 or 990-EZ)
Gross receipts < \$200,000, <i>and</i> Total assets < \$500,000	990-EZ (but may file a Form 990)
Gross receipts ≥ \$200,000, <i>or</i> Total assets ≥ \$500,000	990

Special Rules for Section 509(a)(3) Supporting Organizations. Every supporting organization described in section 509(a)(3) included in the Group Ruling must file a Form 990 or Form 990-EZ (and not Form 990-N) each year, unless (i) the organization can establish that it is an integrated auxiliary of a church within the meaning of Treas. Reg. § 1.6033-2(h) (in which case the organization need not file Form 990/EZ or Form 990-N); or (ii) the organization's gross receipts are normally not more than \$5,000, in which case, the religious supporting organization may file Form 990-N in lieu of a Form 990 or Form 990-EZ.

Automatic Revocation for Failure to File a Required Form 990/EZ/N. Any organization that does not file a required Form 990/EZ/N for three consecutive years automatically loses its tax-exempt status under section 6033(j). If an organization loses its tax-exempt status under

⁹ The penalty for failure to file the Form 990/EZ is \$20 for each day the failure continues, up to a maximum of \$10,000 or 5 percent of the organization's gross receipts, whichever is less. However, organizations with annual gross receipts in excess of \$1 million are subject to penalties of \$100 per day, up to a maximum of \$50,000. I.R.C. § 6652(c)(1)(A). There is no monetary penalty for failing to file or filing late a Form 990-N.

¹⁰ I.R.C. § 6033(a)(3)(A)(i); Treas. Reg. § 1.6033-2(h).

¹¹ Treas. Reg. § 1.6033-2(g)(1)(vii).

section 6033(j), it must file an application (Form 1023 or Form 1023-EZ) with the IRS to reinstate its tax-exempt status. See the IRS website (charities and non-profits) at www.irs.gov/charities-non-profits/ for information on automatic revocation, including the current list of revoked organizations and guidance about reinstatement of exemption.

Public Disclosure and Inspection. Subordinate organizations required to file Form 990/EZ¹² must upon request make a copy of the form and its schedules (other than contributor lists) and attachments available for public inspection during regular business hours at the organization's principal office and at any regional or district offices having three or more employees. Form 990/EZ for a particular year must be made available for a three year period beginning with the due date of the return.¹³ In addition, any organization that files Form 990/EZ must comply with written or in-person requests for copies of the form. The organization may impose no fees other than a reasonable fee to cover copying and mailing costs. If requested, copies of the forms for the past three years must be provided. In-person requests must be satisfied on the same day. Written requests must be satisfied within 30 days.¹⁴

Public Disclosure of Form 990-T. Form 990-T, Exempt Organization Unrelated Business Income Tax Return, for organizations exempt under section 501(c)(3) (which includes all organizations in the USCCB Group Ruling) is subject to rules similar to those for public inspection and copying of Forms 990/EZ.¹⁵

Group Returns. USCCB does not file a group return Form 990 on behalf of any organizations in the Group Ruling. In addition, no subordinate organization under the Group Ruling is authorized to file a group return for its own affiliated group of organizations.

For more information, refer to *Annual Filing Requirements for Catholic Organizations*, available at www.usccb.org/about/general-counsel/ under "Tax and Group Ruling."

9. **Certification of Racial Nondiscrimination by Private Schools in Group Ruling.** Revenue Procedure 75-50¹⁶ sets forth notice, publication, and recordkeeping requirements regarding racially nondiscriminatory policies with which private schools, including

¹² Form 990-N is available for public inspection at no cost through the IRS website at www.irs.gov.

¹³ The penalty for failure to permit public inspection of the Form 990 is \$20 for each day during which such failure continues, up to a maximum of \$10,000. I.R.C. § 6652(c)(1)(C).

¹⁴ I.R.C. § 6104(d). Generally, a copy of an organization's exemption application and supporting documents must also be provided on the same basis. However, since organizations included in the Group Ruling do not file exemption applications with the IRS, nor did the USCCB, organizations included in the Group Ruling should respond to requests for public inspection and written or in-person requests for copies by providing a copy of the page of the current OCD on which they are listed. If a covered organization does not have a copy of the current OCD, it has two weeks within which to make it available for inspection and to comply with in-person requests for copies. Written requests must be satisfied within the general time limits.

¹⁵ Only the Form 990-T itself, and any schedules, attachments, and supporting documents that relate to the imposition of tax on the unrelated business income of the organization, are required to be made available for public inspection.

¹⁶ 1975-2 C.B. 587.

church-related schools, must comply as a condition of establishing and maintaining exempt status under section 501(c)(3) of the Code. Under Rev. Proc. 75-50 private schools are required to file an annual certification of racial nondiscrimination with the IRS. For private schools not required to file Form 990, the annual certification must be filed on Form 5578, Annual Certification of Racial Nondiscrimination for a Private School Exempt from Federal Income Tax. This form is available at www.irs.gov. Form 5578 must be filed by the 15th day of the fifth month following the close of the fiscal year. Form 5578 may be filed by an individual school or by the diocese on behalf of all schools operated under diocesan auspices. The requirements of Rev. Proc. 75-50 remain in effect and must be complied with by all schools listed in the OCD. ***Diocesan or school officials should ensure that the requirements of Rev. Proc. 75-50 are met since failure to do so could jeopardize the tax-exempt status of the school and, in the case of a school not legally separate from the church, the tax-exempt status of the church itself.*** For more information, refer to *Annual Filing Requirements for Catholic Organizations*, available at www.usccb.org/about/general-counsel/ under “Tax and Group Ruling.”

10. **Lobbying Activities.** Subordinate organizations under the Group Ruling may lobby for changes in the law, provided such lobbying is not more than an insubstantial part of their total activities. Attempts to influence legislation both directly and through grassroots lobbying at the federal, state, or local levels are subject to this restriction. The term “lobbying” includes activities in support of or in opposition to referenda, constitutional amendments, and similar ballot initiatives. There is no distinction between lobbying activity that is related to a subordinate organization’s exempt purposes and lobbying that is not. There is no fixed percentage that constitutes a safe harbor for “insubstantial” lobbying. Please consult a local tax advisor about any lobbying activity questions. For more information, refer to *Political Activity and Lobby Guidelines for Catholic Organizations*, available at www.usccb.org/about/general-counsel/ under “Tax and Group Ruling.”

11. **Political Activities.** ***Subordinate organizations under the Group Ruling may not participate or intervene in any political campaign on behalf of or in opposition to any candidate for public office. Violation of the prohibition against political campaign intervention can jeopardize the organization's tax-exempt status.*** In addition to revoking tax-exempt status, IRS may also impose excise taxes on an exempt organization and its managers on account of political expenditures. Please consult a local tax advisor about any political campaign intervention questions. For more information, refer to *Political Activity and Lobby Guidelines for Catholic Organizations*, available at www.usccb.org/about/general-counsel/ under “Tax and Group Ruling.”

12. **Group Exemption Number (“GEN”).** The group exemption number or GEN assigned to the USCCB Group Ruling is 0928. ***This number must be included on each Form 990/EZ, Form 990-T, and Form 5578 required to be filed by a subordinate organization under the Group Ruling.***¹⁷ We advise against using GEN 0928 on Form SS-4, Request for Employer

¹⁷ The IRS has expressed concern about organizations covered under the Group Ruling that fail to include the group exemption number (0928) on their Form 990/EZ/T filings, particularly the initial filing.

Identification Number, because in the past this has resulted in the IRS improperly including the USCCB as part of the subordinate organization's name in IRS records.

13. **Employer Identification Numbers (“EINs”)**. Each subordinate organization under the Group Ruling must have and use its own EIN. **Do not** use the EIN of the USCCB or an affiliated parish, diocese, or other organization in any filings with IRS (*e.g.*, Forms 941, W-2, 1099, or 990/EZ) or other financial documents. Subordinate organizations may *not* use USCCB’s EIN in order to qualify for online donations, grants or matching gifts.

Saint Joseph Regional School & Our Lady of Mercy Academy

2020-2021

Academic Year Calendar



August 20						
Su	M	Tu	W	Th	F	Sa
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

October 20						
Su	M	Tu	W	Th	F	Sa
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

November 20						
Su	M	Tu	W	Th	F	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30					

December 20						
Su	M	Tu	W	Th	F	Sa
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

February 21						
Su	M	Tu	W	Th	F	Sa
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28					

March 21						
Su	M	Tu	W	Th	F	Sa
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

April 21						
Su	M	Tu	W	Th	F	Sa
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

May 21						
Su	M	Tu	W	Th	F	Sa
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

June 21						
Su	M	Tu	W	Th	F	Sa
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

July 21						
Su	M	Tu	W	Th	F	Sa
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

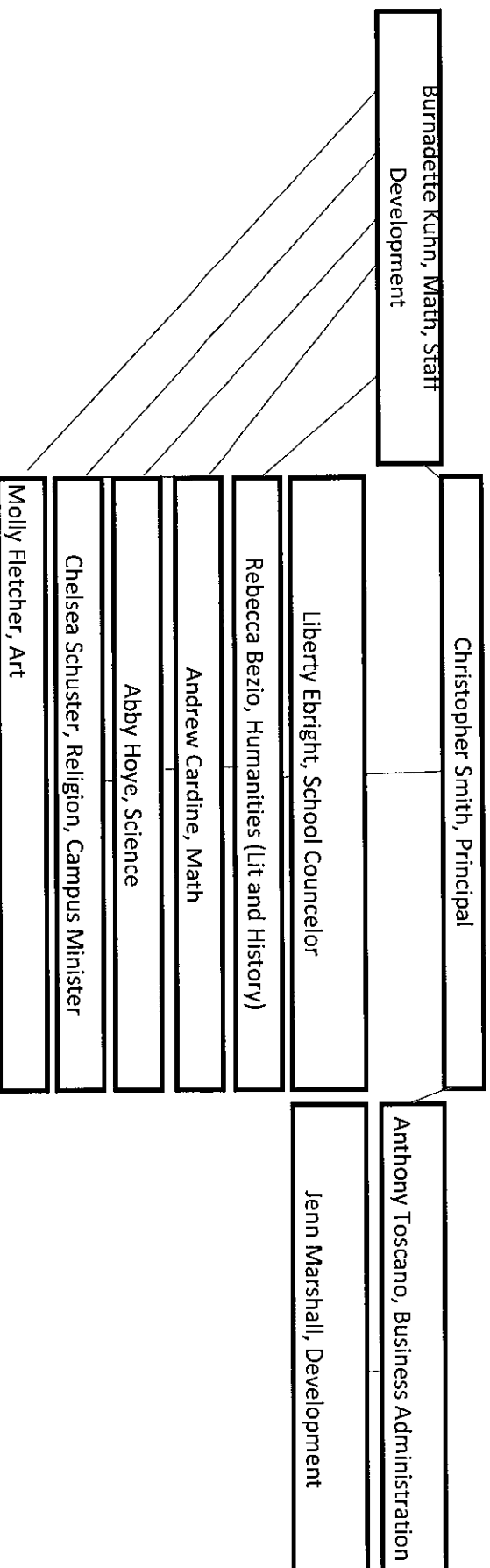
August 21						
Su	M	Tu	W	Th	F	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

September 21						
Su	M	Tu	W	Th	F	Sa
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

Events

Aug 25-28	Teacher In-Service
Aug 31-	First Day of School
Sep 7-	Labor Day
Sep 11-	BTS Picnic
Sep 15-	Middle School BTS Night
Sep 16-	Elementary BTS Night
Oct 6-	Picture Day
Oct 12-	Columbus Day
Oct 21-	Scarecrow Night
Nov 3-	End of Quarter
Nov 9-	Conferences
Nov 10-	Conferences (Half Day)
Nov 11-	Veterans Day
Nov 20-	International Night
Nov 25-27	Thanksgiving Break
Dec 14-	Christmas Pageant
Dec 21-1	Christmas Break
Jan 18	MLK Day
Jan 26	End of 2nd Quarter
Feb 5	Grandparents Day 1/2
Feb 22-26	Winter Break
Mar 12	Teacher In-Service
Mar 27	Spring Auction
Apr 1	Holy Thursday 1/2 Day
Apr 2	Good Friday
Apr 7	End of 3rd Quarter
Apr 26-30	Spring Vacation
May 31	Memorial Day
Jun 11	8th Grade Graduation
Jun 16	Last Day of School 1/2
* Aug 28	9/10 Orientation Day

Saint Joseph Regional School
Organization Chart FY 2020-21



will text

Rebecca Bezio

29 Castle St., Keene NH 03431
(C) 603-499-5330 (E) rsdube@gmail.com

email
7/15

Summary

Compassionate English Teacher who presents course material in a clear, interesting and innovative way. Believes strongly in creating a fun, safe and effective learning environment in which students can achieve their full academic potential as well as gain the social skills they need to thrive in all aspects of their lives.

Experience

- 03/2014-
Current** **TPI Staffing- Keene, NH**
Marketing and Advertising Coordinator
Responsible for Company wide advertising via Print and Electronic Media using a variety of methods.
- 06/2012-
03/2014** **Cheshire Medical Center- Keene, NH**
Registrar
Registered and Admitted Patients for routine procedures.
- 08/2008-
01/2011** **Nanny- Keene, NH**
Live out Nanny
Provided in-home day care for a family in Keene during which time I tutored a school aged child during the summer months and after school hours.
- 06/2007-
01/2010** **Sylvan Learning Center- Keene, NH**
Tutor
Used a variety of teaching methods such as lectures, discussions and demonstrations. Implemented remedial programs for students requiring extra help. Assessed student progress weekly, monthly and quarterly.
- 08-2007-
06/2008** **Monadnock Regional High School- Swanzey, NH**
English Teacher
Presented all class material and policies accurately and clearly for six classes each semester ranging in grades 9-12. Established positive relationships with students, parents, colleagues and administrators. Encouraged discussion of class material to promote critical thinking. Participated in regular training courses to keep up-to-date with new teaching methods and developments in the field. Volunteered to oversee after-curricular activities.

Education

- 2007** **Keene State College- Keene, NH**
Bachelor of Arts: English / Secondary Education
- 2003** **Franklin High School- Franklin, NH**
High School Diploma: General

State of New Hampshire

EdID#

State Board of Education

Date of Issue

89278

EEC

05/31/2017

Rebecca S. Bezio

Is qualified for the following endorsements:
0500

Valid Date: 05/31/2017 - 06/30/2020

Rebecca S. Bezio

4 Charles St.
Keene, NH 03431

State of New Hampshire

State Board of Education
Experienced Educator Certificate

EdID#: 89278


DATE OF ISSUE: 05/31/2017

VALID DATE: 05/31/2017 - 06/30/2020

ENDORSEMENT(S)
English Education (5-12)



Frank Edelblut
Commissioner



Scott J. Mantie, Ph.D.
Division Director

THIS CERTIFIES THAT THE PERSON NAMED ABOVE IS AUTHORIZED FOR EMPLOYMENT
IN NEW HAMPSHIRE SCHOOLS IN ACCORDANCE WITH RSA 186:11.X.

State of New Hampshire

State Board of Education



Frank Edelblut
Frank Edelblut, Commissioner
Department of Education

This credential certifies that the person named above is authorized for employment in New Hampshire schools in accordance with RSA 186:11-X. The holder of this credential is responsible for being knowledgeable regarding current requirements for maintaining an active credential. Credential holders are subject to NH Code of Ethics and Code of Conduct requirements. Beginning Educators, Experienced Educators, Professional Educators, School Nurses, and Paraeducators have met all licensing requirements. Intern credential holders are completing a plan to meet all licensing requirements. Any alteration of this credential violates RSA 638. To verify current credential status: <https://www.education.nh.gov>

Michael Seidel
Michael Seidel, Division Director
Department of Education

Bernadette M. Kuhn
145 Eastern Avenue
Keene, NH 03431-4358

State of New Hampshire

State Board of Education
Experienced Educator Certificate

EdID#: 24132
DATE OF ISSUE: 06/02/2016
VALID DATE: 06/02/2016 - 06/30/2019

ENDORSEMENT(S)
Mathematics (7-12)

Virginia M. Barry

Virginia M. Barry, Ph.D.
Commissioner of Education

Scott J. Mantie

Scott J. Mantie, Ph.D.
Division Director

THIS CERTIFIES THAT THE PERSON NAMED ABOVE IS AUTHORIZED FOR EMPLOYMENT
IN NEW HAMPSHIRE SCHOOLS IN ACCORDANCE WITH RSA 188:11X.

Molly A. Fletcher
273 Washington Street
Keene, NH 03431
(603) 848-1015
molly.a.fletcher@gmail.com

Education:

-Master of Fine Arts, University of Delaware, Newark, DE. May, 2010
-Bachelor of Fine Arts, specialization in Studio Art. Keene State College,
Keene, NH. Cum Laude honors. Dec., 2007
-International Study Abroad: Lorenzo de' Medici Art Institute of Florence, Italy.
Fall, 2005

Residencies:

Artist in Residence, Vermont Studio Center, Johnson VT. Jan, 2012

Forthcoming:

Studio Art Instructor, Summerfuel, UMass Amherst. June , 2014

Solo Exhibitions:

Can't Get There From Here, Brewbaker Gallery, Keene, NH. Sept, 2012

Selected Group Exhibitions:

Keene State College Faculty Exhibition, Keene, NH. Feb, 2014

One Night Stand VI, Curator/Coordinator/Exhibiting artist, Keene, NH. June, 2013

Patrick Clifford//Molly Fletcher//Dylan Jones//Brett Robinson,
Flywheel Arts Collective, Easthampton, MA. Jan, 2013

Keene State College Faculty Exhibition, Keene, NH. Jan, 2012

One Night Stand V, Curator/Coordinator/Exhibiting artist, Keene, NH. April, 2011

33rd Bradley International Print and Drawing Exhibition.
Peoria, Illinois. Jan, 2011

One Night Stand IV, Curator/Coordinator/Exhibiting artist, Keene, NH. Dec., 2010

One Night Stand III, Curator/Coordinator/Exhibiting artist, Keene, NH. Sept., 2010

X ing, University of Delaware MFA Candidate Thesis show,
Philadelphia, PA. May, 2010

University Delaware 2010 MFA Candidate Exhibition, Wilmington, DE. April, 2010

Perceptual Shift: University of Delaware's MFA Candidate Exhibition,
Philadelphia, PA. Feb., 2009

Art on Paper: The Jill Coldren Wilson Gallery, Concord, NH. June, 2008

Informally Known as Prints: Alternative Methods in Printmaking exhibition.
Keene, NH. Nov., 2006

Lorenzo de' Medici Drawing Exhibition. Florence, Italy. Nov, 2005

Related Work Experience:

Adjunct Professor, Foundations of 2D/3D Design, Drawing I,
Painting I, Keene State College, Keene, NH. Aug. 2010- Present

Instructor of Record, Drawing II: Tools and Techniques, University of Delaware,
Newark, DE. Feb.-May 2010

Instructor of Record, Drawing I, University of Delaware, Newark, DE.
Jan-Feb 2010

Instructor of Record, Beginning Drawing and Painting, University of Delaware,
Newark, DE. Sept.-Dec. 2009

Instructor of Record, Beginning Painting, University of Delaware, Newark, DE.
Feb.-July 2009



CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)
07/23/2020

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an **ADDITIONAL INSURED**, the policy(ies) must have **ADDITIONAL INSURED** provisions or be endorsed. If **SUBROGATION IS WAIVED**, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER Porter & Curtis, LLC 225 State Road Media, PA 19063	CONTACT NAME: Vanessa Maurer	FAX (A/C, No):	
	PHONE (A/C, No, Ext): 3039178291	E-MAIL ADDRESS: VMaurer@PorterCurtis.com	
INSURED ST. JOSEPH SCHOOL 92 Wilson Street Keene, NH 03431	INSURER(S) AFFORDING COVERAGE		NAIC #
	INSURER A: THE NATIONAL CATHOLIC RISK RETENTION GROUP, INC		10083
	INSURER B: CHURCH MUTUAL INSURANCE COMPANY		18767
	INSURER C: PRINCETON EXCESS AND SURPLUS LINES INSURANCE COMPA		10786
	INSURER D:		
	INSURER E:		
INSURER F:			

COVERAGES

CERTIFICATE NUMBER: C000194801

Account: 30130-800

REVISION NUMBER:

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

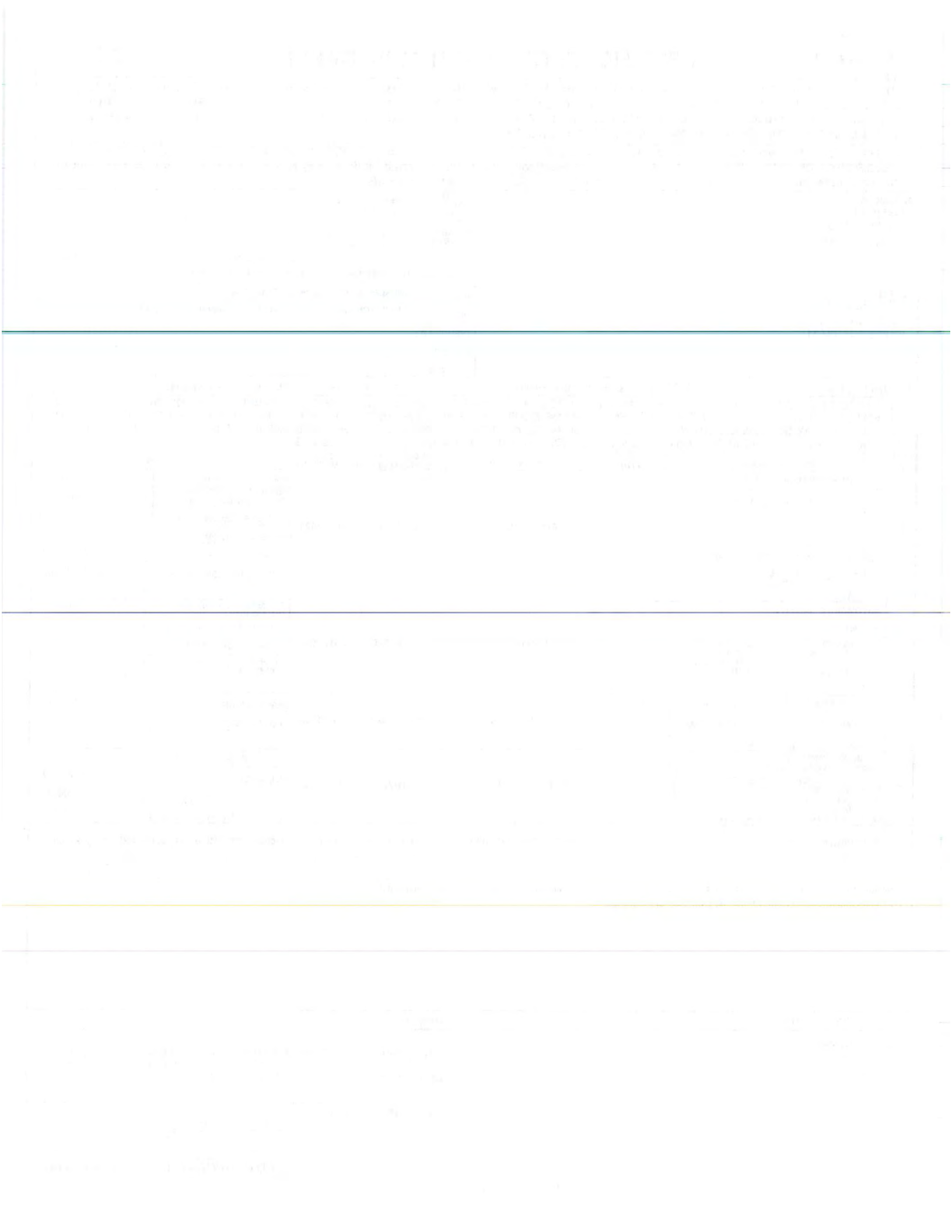
INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY			RRG 10407-23	03/01/2020	03/01/2021	EACH OCCURRENCE \$ 1,000,000
	<input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR						DAMAGE TO RENTED PREMISES (Ea occurrence) \$ Included
							MED EXP (Any one person) \$ Not Covered
							PERSONAL & ADV INJURY \$ 1,000,000
	GEN'L AGGREGATE LIMIT APPLIES PER:						GENERAL AGGREGATE \$ None Applicable
	<input type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC						PRODUCTS - COMP/OP AGG \$ None Applicable
	OTHER:						\$
B	<input checked="" type="checkbox"/> AUTOMOBILE LIABILITY			0500000-09-094170	03/01/2020	03/01/2021	COMBINED SINGLE LIMIT (Ea accident) \$ 1,000,000
	<input checked="" type="checkbox"/> ANY AUTO						BODILY INJURY (Per person) \$
	<input type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS NON-OWNED AUTOS ONLY						BODILY INJURY (Per accident) \$
	<input type="checkbox"/> HIRED AUTOS ONLY						PROPERTY DAMAGE (Per accident) \$
							\$
C	<input type="checkbox"/> UMBRELLA LIAB <input checked="" type="checkbox"/> EXCESS LIAB			N2-A3-FF-000022-01	03/01/2020	03/01/2021	EACH OCCURRENCE \$ 14,000,000
	<input type="checkbox"/> CLAIMS-MADE						AGGREGATE \$ N/A
	DED \$ RETENTION \$						\$
B	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY			0500000-07-094169	03/01/2020	03/01/2021	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTH-ER
	ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH)	<input type="checkbox"/> Y/N	N/A				E.L. EACH ACCIDENT \$ 1,000,000
	If yes, describe under DESCRIPTION OF OPERATIONS below						E.L. DISEASE - EA EMPLOYEE \$ 1,000,000
							E.L. DISEASE - POLICY LIMIT \$ 1,000,000
B	Auto Physical Damage			0500000-09-200850	03/01/2020	03/01/2021	Actual Cash Value Less \$500 Ded. Comp & Coll

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)
The limits include applicable retentions. Evidence of Insurance.

CERTIFICATE HOLDERNew Hampshire Department of Education
101 Pleasant Street
CONCORD, NH 03301**CANCELLATION**

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

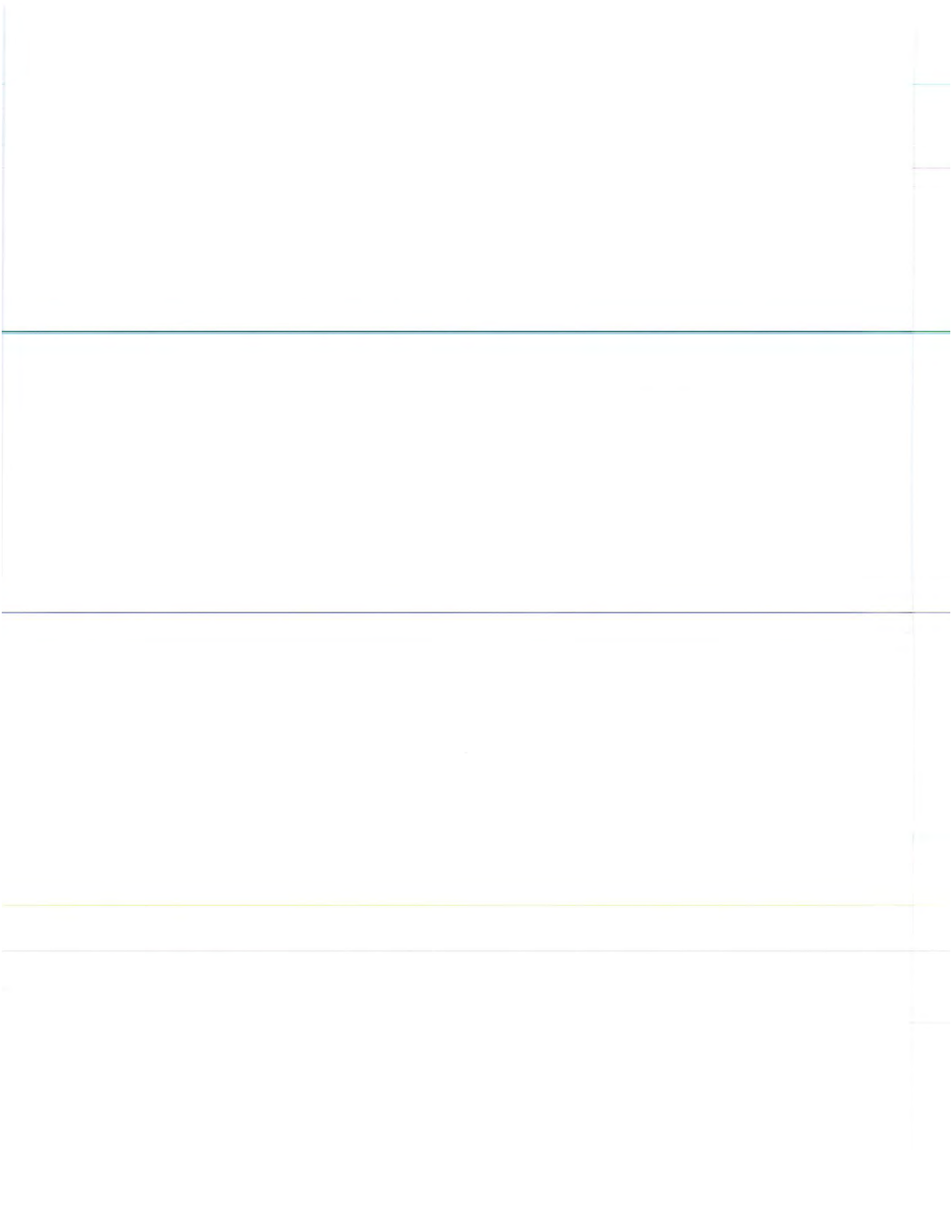
AUTHORIZED REPRESENTATIVE



Year	20-21	21-22	22-23	23-24	ASSUMPTIONS
Total Students (K-8)	180	185	190	195	5 net gain per year
Flat Tuition Rate	\$4,861.14	\$5,347.25	\$5,881.98	\$6,470.18	10% annual per student
Registration Income (K-8)	\$36,000.00	\$36,000.00	\$36,000.00	\$36,000.00	same
Total Tuition K-8	\$911,005.20	\$1,025,241.99	\$1,153,576.09	\$1,297,684.58	
Total Students (9-12)	24	48	72	96	24 added per year until max of 120 reached
Flat Tuition Rate	\$6,300.00	\$7,300.00	\$8,300.00	\$9,300.00	all new students additional \$1000/year
Registration Income (9-12)	\$1,200.00	\$4,800.00	\$7,200.00	\$9,600.00	same
Total Tuition 9-12	\$152,400.00	\$327,600.00	\$526,800.00	\$750,000.00	
Childcare Income	\$68,250.00	\$71,662.50	\$75,245.63	\$79,007.91	5% increase per year
Gross Tuition	\$1,132,855.20	\$1,429,304.49	\$1,762,821.71	\$2,136,292.49	
Diocesan Support	\$120,000.00	\$120,000.00	\$120,000.00	\$120,000.00	same
Bingo Income	\$25,000.00	\$25,000.00	\$25,000.00	\$25,000.00	same
Auction Income	\$30,000.00	\$30,000.00	\$30,000.00	\$30,000.00	same
Winter Raffle	\$5,000.00	\$5,000.00	\$5,000.00	\$5,000.00	same
Other Development	\$15,000.00	\$15,000.00	\$15,000.00	\$15,000.00	same
Total Other Income	\$195,000.00	\$195,000.00	\$195,000.00	\$195,000.00	
Total Income	\$1,327,855.20	\$1,624,304.49	\$1,957,821.71	\$2,331,292.49	
Cost of Good's Sold					
Tuition Rebates and Expenses					
Financial Aid					
Employee Discount	\$112,200.00	\$128,150.00	\$144,100.00	\$160,050.00	same
Paid in Full	\$92,000.00	\$92,000.00	\$92,000.00	\$92,000.00	same
Total Discounts	\$2,975.02	\$3,737.73	\$4,623.24	\$5,648.46	same
Total Discounts	\$207,175.02	\$223,887.73	\$240,723.24	\$257,698.46	
Net Revenue	\$1,120,680.18	\$1,400,416.76	\$1,717,098.48	\$2,073,594.02	
LABOR					
Gross Payroll	\$829,012.96	\$837,303.09	\$845,676.12	\$854,132.88	add 1% per year cost of living increases
Fica	\$63,419.49	\$64,053.69	\$64,694.22	\$65,341.17	
Health Insurance	\$128,936.07	\$135,382.87	\$142,152.02	\$149,259.62	5% increase per year in premiums
Dental	\$5,500.00	\$5,775.00	\$6,063.75	\$6,366.94	5% increase per year in premiums
Life Insurance	\$1,100.00	\$1,155.00	\$1,212.75	\$1,273.39	5% increase per year in premiums
Disability	\$1,100.00	\$1,155.00	\$1,212.75	\$1,273.39	5% increase per year in premiums
Christmas Bonus	\$4,000.00	\$4,000.00	\$4,000.00	\$4,000.00	
Total Labor	\$1,033,068.52	\$1,048,824.65	\$1,065,011.61	\$1,081,647.38	
GENERAL EXPENSES					
Insurance Expense (BL, PL, WC)	\$54,225.60	\$59,648.16	\$65,612.98	\$72,174.27	5% per year per expense
Telecommunication	\$2,400.00	\$2,520.00	\$2,646.00	\$2,778.30	10% increase/year
Instructional Expense	\$10,000.00	\$45,000.00	\$45,000.00	\$45,000.00	
Supplies	\$45,000.00	\$47,250.00	\$49,612.50	\$52,093.13	
Oil (SIRS)	\$25,200.00	\$26,460.00	\$27,783.00	\$29,172.15	

DESCRIPTION	QTY	UNITS	(\$) UNIT COST	(\$K) IMME- DIATE	(\$K) Year 1	(\$K) Years 2-5	(\$K) Years 6-10	(\$K) 10 YR TOTAL
Clairvaux Center Total				\$36	\$422	\$178	\$296	\$932
SITE IMPROVEMENTS								
Remedy various Life Safety Items - Walkways & Exterior Steps	1	job	\$15,000	\$15				\$15
Underground stormwater drainage repairs	1	job	\$60,000		\$60			\$60
Walkway Replacement - Partial	1	job	\$40,000				\$40	\$40
STRUCTURE & EXTERIOR								
Various Life Safety Improvements with Entrance Stairs	1	job	\$15,000	\$15				\$15
Moisture intrusion inspection and drain scoping - engineering advice on stormwater situation	1	job	\$5,000		\$5			\$5
Exterior Brick Masonry Repointing and Repair	4000	sf	\$30		\$120			\$120
Exterior Brick Masonry Seal	10000	sf	\$3			\$30		\$30
Exterior Trim Paint	1	job	\$10,000		\$10			\$10
Roofing Replacement	6000	sf	\$15		\$90			\$90
Remove brick chimney	1	job	\$8,000		\$8			\$8
Reinforce roof framing	1	job	\$100,000				\$100	\$100
Windows - Replacement Thermal Panes	1	job	\$3,000			\$3	\$3	\$6
Spray foam insulation of basement and crawl space perimeter	1	job	\$20,000			\$20		\$20
Improve attic insulation/elevator shaft	1	job	\$5,000			\$5		\$5
Replace mini split HVAC units as needed.	16	ea	\$6,500				\$104	\$104
SPECIAL SYSTEMS								
Asbestos pipe insulation abatement and lead paint testing	1	job	\$8,000		\$8			\$8
Add Emergency lighting	20	each	\$800		\$16			\$16
Improved security system and cameras	1	job	\$25,000		\$25			\$25
INTERIOR								
Flooring replacement	5000	sf	\$8			\$40		\$40
Improvements related to hiding heat pipes and former radiators	1	job	\$50,000			\$50		\$50
Repairs related to historical water damage	1	job	\$10,000		\$10			\$10
Architectural Planning & Design for school use - and associated improvments - not budgeted				\$0	\$0	\$0	\$0	\$0
Subtotal				\$30	\$352	\$148	\$247	777

DESCRIPTION	QTY	UNITS	(\$) UNIT COST	(\$K) IMME- DIATE	(\$K) Year 1	(\$K) Years 2-5	(\$K) Years 6-10	(\$K) 10 YR TOTAL
Contingency & Engineering (20%)				\$6	\$70	\$30	\$49	\$155
TOTAL				\$36	\$422	\$178	\$296	\$932
Projected costs are provided for budgeting purposes only. Your actual costs will vary from our estimates. Except as otherwise noted, we have not budgeted for change of use and/or improvements.								



State of New Hampshire

Department of State

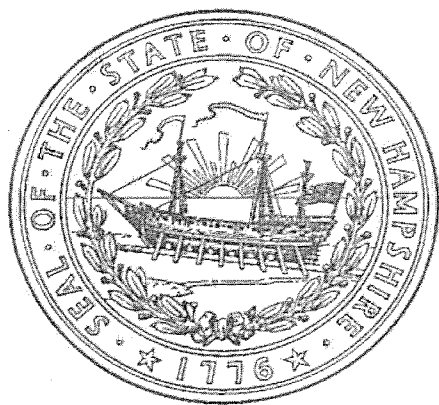
CERTIFICATE OF REGISTERED TRADE NAME OF OUR LADY OF MERCY ACADEMY

This is to certify that **ROMAN CATHOLIC BISHOP OF MANCHESTER** is registered in this office as doing business under the Trade Name **OUR LADY OF MERCY ACADEMY**, at 92 Wilson Street, Keene, NH, 03431, USA on **6/26/2020 4:30:00 PM**.

The nature of business is **Other / Diocesan School**

Expiration Date: **6/26/2025 4:30:00 PM**

Business ID: **845276**



IN TESTIMONY WHEREOF,
I hereto set my hand and cause to be affixed
the Seal of the State of New Hampshire,
this 26th day of June A.D. 2020.

A handwritten signature in dark ink, appearing to read "William M. Gardner".

William M. Gardner
Secretary of State

Restraint and Seclusion Policy -

Regulation 25 of the Education and Training Reform Regulations 2017 provides that:

“A member of staff of a Government school may take any reasonable action that is immediately required to restrain a student of the school from acts or behaviour that is dangerous to the member of staff, the student, or any other person.”

When physical restraint or seclusion should not be used

Physical restraint and seclusion should not be used unless immediately required to protect the safety of the student or any other person (see below).

Rooms or areas designed specifically for the purpose of seclusion or which are used solely or primarily for the purpose of seclusion are not permitted in Victorian government schools.

Restraint and seclusion must not be included in a Behaviour Support Plan or be used as a routine behaviour management technique, to punish or discipline a student or to respond to:

- a student's refusal to comply with a direction, unless that refusal to comply creates an imminent risk to the safety of the student or another person
- a student leaving the classroom/school without permission, unless that conduct causes an imminent risk to the safety of the student or another person
- verbal threats of harm from a student, except where there is a reasonable belief that the threat will be immediately enacted
- property destruction caused by the student unless that destruction is placing any person at immediate risk of harm.

Types of physical restraint which must not be used include:

- any restraint which covers the student's mouth or nose, in any way restricts breathing
- the application of pressure to a student's neck, chest, abdomen, joints or pressure points to cause pain or which involves the hyperextension of joints
- holding a student's head forward, headlocks, choke holds
- take-downs which allow students to free-fall to the ground whether or not in a prone or supine position or otherwise
- wrestling holds (including 'full or half nelsons'), using a hog-tied position or straddling any part of a student's body
- basket holds, bear hugs, 'therapeutic holding'.

When physical restraint or seclusion may be used

School staff may only use physical restraint on a student when there is an imminent threat of physical harm or danger to the student or others; and where such action (ie to physically restrain or seclude) would be considered reasonable in all the circumstances and there is no less restrictive means of responding in the circumstances.

As with physical restraint, seclusion should only be used when it is immediately required to protect the safety of the student or any other person, as permitted by Regulation 25.

The decision about whether to use physical restraint or seclusion rests with the professional judgment of the staff member/s involved, who will need to take into account both their duty of care to their students, their right to protect themselves from harm and obligations under the Charter of Human Rights and Responsibilities Act 2006.

Mechanical and chemical restraint

Mechanical restraints should never be used in schools to restrict a student's freedom of movement, unless the device is for a therapeutic purpose with written evidence of the prescription / recommendation, or if required to travel safely in a vehicle.

Medication primarily used to control or subdue behaviour and which is not being used to treat an underlying physical or mental illness or a physical condition should never be used in schools.

During Restraint

If applying physical restraint in the limited circumstances set out above, staff must:

- use the minimum force required to avoid the dangerous behaviour or risk of harm
- only restrain the student for the minimum duration required and stop restraining the student once the danger has passed.

Staff should ensure the type of restraint used is consistent with a student's individual needs and circumstances, including:

- the age/size of the student
- gender of the student
- any impairment of the student e.g. physical, intellectual, neurological, behavioural, sensory (visual or hearing), or communication
- any mental or psychological conditions of the student, including any experience of trauma
- any other medical conditions of the student
- the likely response of the student
- the environment in which the restraint is taking place.

Staff should monitor the student for any indicators or distress. Staff should talk to the student throughout the incident, making it clear to the student why the physical restraint is being applied. Staff should also calmly explain that the physical restraint will stop once it is no longer necessary to protect the student and/or others.

Actions after restraint has been used

This table explains the follow up actions that must be undertaken after a student has been physically restrained or secluded.

Action	Description
Reporting of the physical restraint/seclusion	The staff member(s) involved in the incident must immediately notify the principal of the incident.
	A staff member should contact the student's parents and provide them with details of the incident as soon as possible.
	The incident may need to be reported to: the Security Services Unit (previously known as the Emergency Management Unit), see: Reporting and managing emergencies and incidents Edusafe WorkSafe, see: WorkSafe Notification .
Providing supports for those involved	Following the use of restraint on a student, appropriate supports must be offered to the following people:
	The student who has been restrained or secluded and their parents/guardians. This may include participation in decisions involving the student's behaviour management, Student Support Group meetings, the development of a student Behaviour Support Plan, and involvement of Student Support Services. For policy advice on the prevention of endangering behaviour and promoting positive behaviours refer to: Student Engagement Other students and staff members who were involved in or witnessed the incident. This may include a debriefing in relation to the incident, and counselling support.

Action	Description
Maintain records of the incident	<p>A written record of the incident and the physical restraint or seclusion used must be made by the principal as soon as practicable. This record should be added to a student's file on CASES 21 or SOCS as appropriate. The record should detail:</p>
	the name of the student/s and staff member/s involved
	date, time and location of the incident
	names of witnesses (staff and other students)
	what exactly happened (a brief factual account)
	any action taken to de-escalate the situation
	why physical intervention was used (if applicable)
	the nature of any physical intervention used
	how long the physical intervention lasted
	names of witnesses (staff and other students)
	the student's response and the outcome of the incident
	any injuries or damage to property
	immediate post incident actions, such as first aid or contact with emergency services
	details of contact with the student's parent/carers
	details of any post-incident support provided or organised.
	The principal should also arrange for all staff who were involved/present at the incident to prepare a statement / record of their involvement or observations of the incident.
Plan for the future	<p>Post-incident, the school should consider the preventative and de-escalation strategies that might reduce the likelihood of an incident happening again. For example – reviewing and amending the student's Behaviour Support Plan, consider the training needs of staff working closely with the student/s involved in the incident.</p>

Meskoob, Shireen

To: John Bates
Subject: RE: Our Lady of Mercy Academy Fire and Life Safety Inspection

From: John Bates <jbates@ci.keene.nh.us>
Sent: Friday, July 31, 2020 11:21 AM
To: Meskoob, Shireen <Shireen.Meskoob@doe.nh.gov>
Cc: Anthony Toscano <atoscano@stjosephkeene.org>
Subject: RE: Our Lady of Mercy Academy Fire and Life Safety Inspection

EXTERNAL: Do not open attachments or click on links unless you recognize and trust the sender.

Shireen,

The new school for Our Lady of Mercy Academy has been approved for a phased implementation of requirements. For them to occupy this year we have met and will conduct a final inspection prior to them opening. The items that are not going to be complete is the sprinkler system. This will happen prior to them moving to a 9-12 grade education. I will also conduct the annual school inspection prior to December 15th that is required by the State DOE, and FM. I can submit a report of inspection prior to opening this year, and the annual inspection that will happen before December 15th 2020 if you would like me to. I have been actively involved with the transition of this building to an educational use, and feel it is safe to move forward with granting them approval for education at this location.

John Bates

Fire Prevention Officer / Paramedic
CFPS, IAAI-FIT, CFEI
City of Keene Fire Department
31 Vernon Street
Keene, NH. 03431
jbates@ci.keene.nh.us
603-757-1863 Direct Line
603-357-9861 Dispatch
603-209-2574 Cell



City of Keene
New Hampshire

August 14, 2020

St. Joseph Regional School
c/o Mr. Anthony Toscano
161-185 Main Street
Keene, NH 03431
atoscano@stjosephkeene.org

Re: Clairveaux Center – Change of Use – 161-185 Main Street

Dear Mr. Toscano,

Per correspondence received August 14, 2020, we understand that you propose to convert the former Clairveaux Center located at 161-185 Main Street (TMP #584-006-000) from an office use to an institutional use for Our Lady of Mercy Academy. This project will be completed in phases, with the first phase consisting of minor interior alterations to accommodate 20 students and 5 staff members. There are no proposed modifications to the building exterior or site at this time. The parking demand will decrease from 11 parking spaces to 5 parking spaces, and traffic generation is estimated to be nine vehicle trips to and from the site during scheduled morning drop-off and afternoon pick-up times. All school-related traffic will enter the site from Davis Street and exit onto Wilson Street using the one-way exit.

Given the scope of work and the factors stated above, the first phase of this project does not trigger review by the Planning Board or administrative approval for compliance with Keene's Development Standards. However, based on information provided in your correspondence, the impacts of this change of use will be increasing in the future as the number of staff and students increase. Future phases of this project will need to be reevaluated to determine whether review is required under these same regulations.

Please be aware that this letter does not authorize you or the Owner to make other alterations to this approved scope of work.

Thank you for submitting your inquiry furthering Keene's citizens' goal of collaboratively integrating environmental, economic and social sustainability.

Sincerely,

Rhett Lamb,
ACM/Community Development Director

cc: Tim Ballantine, Assessing Department
Don Lussier, City Engineer
Mike Hagan, Plans Examiner
Project File: COA-2015-07, Modifications #1-3

NEW HAMPSHIRE DEPARTMENT OF EDUCATION
101 PLEASANT STREET
CONCORD, NEW HAMPSHIRE 03301-3860

NONPUBLIC SCHOOL ZONING VERIFICATION FORM

(Please Print)

Name of Nonpublic School: Our Lady of Mercy Academy at Saint Joseph Regional School
School's Physical Address: 161 Main St. Keene, NH 03431
Applicant's Name: Anthony Toscano Tel Number: (603) 352-2720

Instructions: If zoning action is not required, complete Section 1. If zoning action is needed, complete Section 2. Indicate any zoning restrictions placed on this nonpublic school on this form or attach signed copies of the zoning board's decision.

Section 1:

The Nonpublic School named above **DOES CONFORM** to the zoning requirements of

(City/Town) KEENE.

Comments:

Name of Official: (please print) John Rogers Signature: [Signature]
Date: 8-14-2009 Telephone: 352 5440 Email: JROGERS@CI.KEENE.NH.US

Section 2:

The Nonpublic School named above has been granted approval by the Zoning Board of

(City/Town) _____.

Check one.

_____ No restrictions were specified by the zoning authority.

_____ Restrictions specified by the zoning authority are noted below or attached.

Comments:

Name of Official: (please print) _____ Signature: _____
Date: _____ Telephone: _____ Email: _____

Temporary Certificate of Occupancy



City of Keene Community Development Department (603) 352-5440

Permit Number	20200278
Property	161-183 MAIN ST.
Owner	ROMAN CATHOLIC BISHOP OF MANCHESTER NH
Owner Address	2015-11-17 16:21:07.480
TMP	5840060000000000
Zone	High Density
Code	NEW HAMPSHIRE STATE BUILDING CODE 2015
Occupancy	SCHOOL
Conditions	THIS IS TO ALLOW OCCUPANCY FOR TEACHERS AND STAFF, STUDENTS SHALL NOT OCCUPY THE BUILDING UNTIL THE FIRE ALARM AND FORCE NOTIFICATION IS INSTALLED.
Use Group	E EDUCATIONAL
Construction Type	TYPE IIIB
Design Occupancy Load	49
Auto Sprinkler	NO
ZBA Case #	
SPR	
Subdivision	

All remaining work shall be completed and building permit authorized prior to issuance of a certificate of occupancy.

Date of Expiration 09/13/2020

Building Official
City of Keene

New Hampshire Department of Education
Bureau of School Safety and Facility Management
101 Pleasant Street, Concord, NH 03301-3852
Telephone (603) 271-3620

School Health Inspection Form

Last revised: June 22, 2020

SCHOOL INFORMATION		
School Name: <i>Our Lady of Mercy Academy</i>	Address: <i>161 Main St.</i>	SAU #:
Town/City: <i>Keene</i>	State: <i>NH</i>	Zip: <i>03431</i>
School Contact: <i>Anthony Toscano</i>	Title: <i>Dir of Operations</i>	
Name of each building used by students: <i>Chauvaux Center</i>		Enrollment: <i>17</i>
Year each building was built:		
Water supply (municipal, well, etc.): <i>Municipal</i>	Wastewater system (municipal, septic, etc.): <i>Municipal</i>	
INSPECTION INFORMATION		
Inspector's name: <i>TJ O'Brien</i>	Organization: <i>City of Keene</i>	Inspector's phone: <i>603-499-2990</i>
Inspector's email: <i>tobrien@ci.keene.us</i>	Were all buildings used by students inspected (Y/N)? <i>(Y)</i>	Date of Inspection: <i>9/25/2020</i>
INFORMATION/INSTRUCTION		
<p>A Health Inspection is part of the NH Department of Education's school approval review to ensure school facilities are meeting minimum standards, Ed 306.07 and Ed 403.01(c). The form shall be completed the school year in which the school is up for a school approval review; preferably prior to December 15th.</p> <p>The health inspection must be performed by a health official, not a school employee. Visit https://www.dhhs.nh.gov/dphs/holu/documents/officers.pdf for a list of local health officers.</p> <p>Kitchen inspections are not acceptable substitutes for the health inspection.</p> <p>It is helpful to provide the inspector with a map of the school showing room numbers and special areas such as the gym, cafeteria, offices, and library.</p> <p>Attach the following to the health inspection form, if applicable:</p> <ul style="list-style-type: none"> ○ Most recent septic tank pumping service ○ Asbestos inspection reports for buildings built before 1990 ○ Animal vaccination certificates, if applicable ○ Swimming pool testing records, if applicable <p>Please submit the completed form to the NH Department of Education as follows:</p> <ul style="list-style-type: none"> ○ Public schools - email the form to Marjorie Schoonmaker at: marjorie.schoonmaker@doe.nh.gov ○ Public charter schools - email the form to Marjorie Schoonmaker at: marjorie.schoonmaker@doe.nh.gov ○ Non-public schools – email the form to Shireen Meskoob at: shireen.meskoob@doe.nh.gov 		

SANITARY INVESTIGATION	RESPONSE (circle best answer)	CORRECTIVE ACTION	CORRECTIVE DATE
1. Is the school free of garbage, insects, rodents, or other unsanitary conditions?	<div> <input checked="" type="radio"/> YES <input type="radio"/> NO </div> <div>Notes: JP Pest Servicing</div>		
RESTROOMS	RESPONSE (circle best answer)	CORRECTIVE ACTION	CORRECTIVE DATE
2. Are all restrooms clean and in working order?	<div> <input checked="" type="radio"/> YES <input type="radio"/> NO </div> <div>Notes:</div>		
3. Do all restrooms have hot water (85 to 110 degrees F), dispensed soap, toilet paper & dispensed paper towels or heated air dryers?	<div> <input checked="" type="radio"/> YES <input type="radio"/> NO </div> <div>Notes:</div>		
4. Is there at least one toilet fixture for every 50 people? (IPC 2009)	<div> <input checked="" type="radio"/> YES <input type="radio"/> NO </div> <div>Notes:</div>		
FOOD PREPARATION, DINING AREAS, SINKS, & WATER FOUNTAINS	RESPONSE (circle best answer)	CORRECTIVE ACTION	CORRECTIVE DATE
5. If food is prepared on-site, is a current license from the municipality or state licensing authority posted?	<div> <input type="radio"/> YES <input checked="" type="radio"/> NO <input type="radio"/> NA </div> <div>Notes: No Food Prep</div>		
6. Are toxic materials clearly labeled and properly stored away from food?	<div> <input type="radio"/> YES <input type="radio"/> NO </div> <div>Notes: cleaning materials in locked janitor closet</div>		
7. Is hot water (110 to 130 degrees F) available for culinary purposes, cleansing, laundry and building maintenance? (IPC 2009)	<div> <input checked="" type="radio"/> YES <input type="radio"/> NO </div> <div>Notes: Water available for cleaning purposes</div>		
8. Are water fountains clean with sufficient water pressure?	<div> <input type="radio"/> YES <input type="radio"/> NO </div> <div>Notes: water Bubblers</div>		

SEPTIC SYSTEMS & WATER SUPPLY SYSTEMS	RESPONSE (circle best answer)			CORRECTIVE ACTION	CORRECTIVE DATE
9. Is there a pump schedule for the septic system?	YES	NO	NA		
	Notes:				
10. Is there a reason to suspect the wastewater system has a system failure (backup, etc.)? If so, please describe the condition.	YES		NO		
	Notes:				
11. If the school's drinking water is supplied from an onsite well and the student and staff population is 25 or more, is the well registered and tested as required by NH Dept. of Environmental Services (DES) administrative rule Env-Dw 700?	YES	NO	NA		
	Notes:				
12. In the past 2 years, has the school performed any voluntary water testing for radon or PFCs? If so, please attach findings.	YES	NO	NA		
	Notes:				
ENVIRONMENTAL HAZARDS (mold, asbestos, lead paint, & radon)	RESPONSE (circle best answer)			CORRECTIVE ACTION	CORRECTIVE DATE
13. Is there a presence of water leaks in the ceiling, walls, or internal plumbing? If so, please describe the condition and location.	YES		NO		
	Notes:				
14. Is there any mildew or mold present? If so, please describe the condition and location.	YES		NO		
	Notes:				
15. If the building was built before 1990, has the school provided an asbestos inspection report showing its buildings are free of asbestos containing building material (ACBM), or an inspection within the last three years showing that areas with ACBM have been properly maintained? (AHERA, 40 CFR 763, Subpart E and RSA 141-E)	YES	NO	NA		
	Notes:				

16. If the building was built before 1978, are you aware of the presence of flaking paint?	YES	NO	NA		
	Notes:				
17. If the building was built before 1978, is there worn or damaged paint on windows, doors, or door jambs?	YES	NO	NA		
	Notes:				
18. If the building was built before 1978, has any follow up testing been performed by a licensed lead inspector/risk assessor?	YES	NO	NA		
	Notes:				
19. Has the school performed any voluntary air testing for radon?	YES	NO			
	Notes:				
SMOKING	RESPONSE (circle best answer)			CORRECTIVE ACTION	CORRECTIVE DATE
20. Are signs posted noting the prohibition of smoking on the school's grounds? RSA 126-K:7 prohibits the use of tobacco products, e-cigarettes, or liquid nicotine on public school grounds.	<u>YES</u>	NO			
	Notes:				
ANIMALS ON SHOOOL PROPERTY (if applicable)	RESPONSE (circle best answer)			CORRECTIVE ACTION	CORRECTIVE DATE
21. Are all animals enclosed by appropriate and lockable cages/stalls?	YES	<u>NO</u>	NA		
	Notes:				
22. Do all animals have a current certificate of good health from a licensed veterinarian?	YES	NO	<u>NA</u>		
	Notes:				
23. Does it appear that animal fecal material is adequately cleaned from the cage/stall?	YES	NO	<u>NA</u>		
	Notes:				
24. Is a hand washing station available nearby with hot water and soap for those students or staff handling the animals or cleaning their cages?	YES	NO	<u>NA</u>		
	Notes:				

ADDITIONAL REMARKS

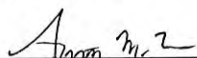
Our Lady of Mercy Academy is opening its high school in a phased approach. This year (year one) only has 17 occupants. The city of Keene will be working with the school during each phase to ensure code compliance.

T.J. O'Brien
Commercial Building
Inspector



ACKNOWLEDGEMENT

"I acknowledge receipt of this report and understand a complete copy must be forwarded to the Department of Education."



School contact name and signature

8/25/2020
Date

"I acknowledge this form has been completed to the best of my knowledge."



Inspector name and signature

8/25/2020
Date

Meskoob, Shireen

From: Anthony Toscano <atoscano@stjosephkeene.org>
Sent: Tuesday, August 25, 2020 9:41 AM
To: Meskoob, Shireen
Cc: tobrien@ci.keene.nh.us; Smith, Christopher
Subject: Health inspection
Attachments: health-08252020092632.pdf

EXTERNAL: Do not open attachments or click on links unless you recognize and trust the sender.

Hi Shireen,

Attached please find the health inspection report filed by Mr. TJ O'Brien of the City of Keene. There is one section incomplete (as it is Lt. Bates' area of expertise.) I believe Jon has communicated with you that we have discussed an in-depth plan to resolve all health and safety issues regarding mold and mildew, if any.

I have copied TJ on this email as he advised that you are welcome to call him with any issues. I am very much looking forward to working with him as our school grows and the regulations become more complex. I also wanted to copy him as I filled in some of the document (the contact info, etc) and wanted to keep him completely in the loop.

I can't thank you enough for all you have done, Shireen. Please just confirm that this was the last document needed. Please let me know when we think the visit will be scheduled.

Hope all is well!

Anthony Toscano
Operations Manager
atoscano@stjosephkeene.org

September 10, 2020

EXECUTIVE SUMMARY*Charter Amendment for Virtual Learning Academy Charter School***A. ACTION NEEDED**

A vote is needed from the State Board of Education to amend the charter for *Virtual Learning Academy Charter School* to increase the school's enrollments in all grade levels.

B. RATIONALE FOR ACTION

The process of the amendment request is required by:

- Chapter 194-B, Chartered Public Schools
 - RSA 194-B:3, XI
- Ed 318.11(e)

The Department of Education received a request for an amendment to *Virtual Learning Academy Charter School's* charter to increase enrollment in kindergarten and grades one through twelve from 2,022 full-time equivalent students, which was approved by the Board on December 13, 2018, to 4,317 full-time equivalent students.

The VLACS Board of Trustees is seeking this amendment in order to meet the needs of New Hampshire students and families during the pandemic. From July 1, 2020 to August 26, 2020 the school has received 19,640 half-credit enrollment requests. Last year during the same period of time, the school processed 4,526 half-credit enrollment requests. Clearly there is an expanded need for the school's services. The request for 4,317 full-time enrollments will more than double the capacity of the school while limiting the impact on state resources should the number of requests continue to expand.

C. EFFECTS OF THIS ACTION

Virtual Learning Academy Charter School will be able to meet the needs of New Hampshire families by increasing enrollment from 2,022 to 4,317 full time equivalent students.

D. POSSIBLE MOTION

Pursuant to RSA 194-B:3, XI, I move that the State Board of Education authorizes *Virtual Learning Academy Charter School* to amend the charter to increase enrollment from 2,022 to 4,317 full time equivalent students.

OR:

I move that the State Board of Education _____
(indicate some other action)



PO Box 1050
30 Linden Street, Building B
Exeter, NH. 03833
Phone: 603.778.2500
Fax: 866.651.5038

August 27, 2020

Mr. Drew Cline, Chairman
State Board of Education
NH Department of Education
101 Pleasant Street
Concord, NH. 03301

Dear Chairman Cline:

The Board of Trustees of the Virtual Learning Academy Charter School is seeking an amendment to their charter which will allow for an expansion of enrollments in all grade levels.

Based on the last approved charter dated December 13, 2018, the school has an enrollment cap of 2,022 full-time equivalent students and is currently authorized to operate in grades kindergarten and one through twelve.

This amendment seeks to increase the total student enrollment cap from 2,022 full-time equivalent students (noted above) to 4,317 full-time equivalent students (new enrollment cap) with authorization to operate in grades kindergarten and one through twelve.

The VLACS Board of Trustees is seeking this amendment in order to meet the needs of New Hampshire students and families during the pandemic. From July 1, 2020 to August 26, 2020 the school has received 19,640 half-credit enrollment requests. Last year during the same period of time, the school processed 4,526 half-credit enrollment requests. Clearly there is an expanded need for the school's services. The request for 4,317 full-time enrollments will more than double the capacity of the school while limiting the impact on state resources should the number of requests continue to expand.

Sincerely,

A handwritten signature in black ink, appearing to read "Steve Kossakoski".

Steve Kossakoski, Ph.D.
Chief Executive Officer

Spark Academy Charter School First Year Program Audit

I. OVERVIEW OF THE CHARTER SCHOOL

The New Hampshire Department of Education is required to conduct a first year program audit for all new charter schools.

In order to ensure compliance with its application and contract and applicable law, a chartered public school shall be subject to a first year program audit by the department of education, or its agent (RSA 184-B:10:III).

School Profile

Spark Academy for Advanced Technologies (SAAT) is an open enrollment public charter school for students in grades 9 – 12, in Manchester, New Hampshire. SAAT was approved by the New Hampshire State Board of Education on April 11, 2019, and opened to students September 4, 2019. SAAT operates with oversight by a Board of Trustees and the New Hampshire Department of Education.

As a public charter school, Spark Academy for Advanced Technologies is open to student applicants from any New Hampshire community. In the 2019-2020 school year, SAAT served 24.5 ninth grade students from 7 school districts. There are 38 students enrolled for the 2020-2021 school year, with the addition of a tenth grade.

The primary purpose of Spark Academy for Advanced Technologies is to provide their students with a high school and early college education based on problem-solving, real-world experience, and a sound work ethic. Students will cultivate their skills, ingenuity, and character, ready to challenge the future with confidence, courage, and curiosity. SAAT's last day for the 2018-2019 school year was June 2, as they met the required 990 number of hours of instruction.

School Mission and Vision Statements

Mission: To empower our students with opportunities to master technical skills, both practical and theoretical, in the context of a high school and early college program that emphasizes the dignity and value of work. Students will discover an appreciation for the power of the sciences combined with an understanding of the humanities. They will develop into innovative problem-solvers ready to enter the technical careers of their choice upon graduation or through further study.

Vision: To provide our students with a high school and early college education based on problem-solving, real-world experience, and a sound work ethic. They will cultivate their skills, ingenuity, and character, ready to challenge the future with confidence, courage, and curiosity.

II. CHARTER SCHOOL PROGRAM AUDIT

On July 23, 2020, the 1st Year Program Audit for Spark Academy for Advanced Technologies was conducted virtually Jane Waterhouse, Charter School Administrator for the New Hampshire Department of Education. Board members, School Administrators, teachers, students and parents were all present to answer questions and to provide insights into the school operations. The criteria for the program audit, the evaluation and the justification is itemized in the following rubric.

Evaluation Ratings					
Level of Achievement	Description				
Meeting (M)	Meets expectations for a first year charter school. Demonstrates a thorough approach and understanding of requirements. Accomplishing requirement(s).				
Developing, a Work in Progress (D)	Plans are in the process of development, or, plans are in place and school is working towards implementation.				
Needs Improvement (NI)	Needs significant improvement or attention. Little to no evidence of planning or development in this area.				
Evaluation Criteria		Ratings		Comments	Recommendations
Governance and Leadership	M	D	NI		
Progress towards the implementation of the charter school’s mission	✓			Spark Academy has made significant progress towards the implementation of the schools mission: <ul style="list-style-type: none">Implemented CAD and Robotics project-based learning for all first year studentsAdded a Computer Information Systems to the curriculumExceeding requirements for a high school diploma by blending MCC college course work throughout the Advanced Manufacturing curriculumEngaged daily in promoting and building a positive school cultureDesigned student work based on interestsPromoted the value and dignity of work, with a never give up work ethic in their productive struggle to learn as they work to understand and develop skills.	

			<p>The school is fortunate to be located and partnered with MCC as it presents unlimited advantages and endless possibilities and options. Since Spark's program needs to blend seamlessly with that of MCC, the administrators have taken much care to work closely with the college to synchronize the Spark program closely with the college.</p> <p>Self-identified challenges due to COVID-19's effect on 2019-2020 plans:</p> <ul style="list-style-type: none"> • Additional staff for subbing due to the hybrid return to school model • Becoming familiar with changing reporting and submission schedules • In need of additional academic and health-related resources • Many first year plan components had to be put aside due to COVID-19, such as recruitment and fundraising. • Institutional advancement worktime needed – challenging to fit this critical area into the schedule. 	
Indicators that the charter school and the board of trustees function effectively in support of the school	✓		<p>Spark is currently governed by a seven-member Board. Several Board members were present on the Zoom call. The Board meets bi-monthly or more often as needed, and board meeting agendas and minutes are posted on the website. School Director reports to the board at meetings and committees give updates. The board members are very engaged in their committee work, especially in planning and implementing plans for networking, developing partnerships, accountability and sustainability, policy development, etc. The school director feels very supported by the board.</p>	
Board Members, if different from those listed in the Charter	✓		Added 2 parents	
Board Roles and Responsibilities	✓		<p>The Board exceeds expectations as a team, through strong and collaborative relationships.</p> <ul style="list-style-type: none"> • Very collegial group on the Board • Meet regularly 6 times per year and more often as needed • Understand their roles and duties and fulfills all responsibilities 	

				<ul style="list-style-type: none"> • Several committees to ensure all aspects of governorship is prioritized <p>Board Training: This process will always be ongoing. Board Training was completed for SY 2019-2020.</p> <ul style="list-style-type: none"> • Training planned for new board members. • Annual training is planned. • Orientation • Bullying • Review of School Laws 	
Organizational Chart	✓			Complete	
Creation of Policies and Procedures Ex: Grievance/Complaints	✓			<p>Policies are posted on the school website.</p> <p>Policy review annually and on an as needed basis.</p>	
Accountability Plan for school growth	✓			<p>An Accountability Plan with short and long term organizational, programmatic and academic goals has been developed.</p> <p>This plan is a framework for system improvements and tracking progress towards intended measurable outcomes with timeframes for implementation. Spark has submitted a draft of the accountability plan which will be reviewed at the October Board of Trustees meeting.</p>	Recommend further break-down of each goal into objectives that identify specific tasks/steps/strategies to achieve the outcomes. Also recommend delegating tasks and responsibilities to board committees and members, and school staff members.
Committees	✓			<ul style="list-style-type: none"> • Finance • Policy • Curriculum • Outreach/Networking • Fundraising 	
Administration and Board Evaluation	✓			Administration and Board self-evaluations were completed in July 2020	
School Operations	M	D	NI	Comments	
Admissions	✓			<p>Currently hosting virtual open house programs and family meetings.</p> <p>Enrollment for SY 2020-2021 is up from FY 2020-2020, but lower than projected due to COVID-19.</p>	
Student Recruitment Plan and enrollment timeline	✓			Short and long-term recruitment activities are listed in a timeline by year. A student recruitment plan for 2020-2021 is included in the school's Accountability Plan which will be	Recommend further break down of each goal into specific measurable, time-bound objectives that identify tasks/steps/strategies to achieve

				presented to the board for review at the October 2020 Board meeting. As a result of COVID-19 and its impact on planned recruiting activities, the school developed alternative recruitment activities for the 2020-2021 school year.	the goals. Also recommend delegating tasks and responsibilities to board committees and members and staff.
School Year Days or Hours	✓			Spark Academy met the required 990 hours of instruction.	
Background/Criminal Records Check - List	✓			All completed for 2019-2020	
Administration and Faculty Qualifications Percent Certified	✓			75% Certified: 3: Grade 5-12 Certified 2: College Qualified with Masters degrees	
Employee Job Descriptions		✓		1 job description for all staff and faculty. Job descriptions are in the process of being updated for the 2020-2021 school year.	Recommend creating specific job descriptions for each position: administrator, teachers, paraprofessionals...
Average Student/Teacher Ratio	✓			No more than 15:1	
Teacher Performance Evaluation		✓		Ongoing, informal and year-end. Formal evaluations were planned but due to COVID these were not completed. Teacher performance will be more formally recorded to document the frequent observations made by the Director.	
Incident Reports	✓			No reported incident reports	
Personnel Compensation Plan	✓			<ul style="list-style-type: none"> • Heath • Disability • Life • Paid Sick and Vacation Leave • Professional Development • Paid Exploration Days 	
Student Transportation	✓			Manchester School District and family transportation	
Administration and Faculty: PD and training program	✓			<ul style="list-style-type: none"> • Exploration days • Presentations • Guest Speakers • Suicide prevention curriculum • Canvass • Live stream 	

				COVID hampered efforts for physical exploration which marked pre-pandemic conditions. Until such time as conditions improve, the school will undertake more virtual explorations with interviews and discussions with area industry leaders. In this manner, the school plans to continue in the spirit of the exploration program.	
School Culture	✓			<p>A very positive and supportive school culture with a strong sense of community provided by school staff, students and parents through informal feedback. This indicates that the school has done much to establish a healthy school culture that has been maintained throughout the remote learning process.</p> <ul style="list-style-type: none"> • Teachers are mentors, teaching core Values daily imbedded in lessons, and failure is looked at as a learning opportunity – respect, citizenship, • Opportunities for academic group work – cohorts where students help each other through challenging assignments and projects. • Many opportunities for enrichment • Students held responsible for their learning • Social work projects – build a bed • Students’ interests guide instruction and options • College student volunteer in classes • Good communication • Teachers involved in curriculum and all input is listened to and valued. Decisions are made as a result of teacher input. 	
Parent/Student/Teacher Handbooks	✓			Completed, thorough and online	
Student Information System	✓			<p>Comprehensive system to track student data: Rediker grade book platform for assignments, parent and student portal</p> <ul style="list-style-type: none"> • admin plus portal, • Student and Parent portals • Google classroom, <p>Used to determine growth from one year to the next. Students progress to associates degree before they graduate.</p>	

Timely submissions required by the NH DOE and the charter school office.	✓			At this time, the school is up-to-date on 2019-2020 submissions.	
Academic Measurable Goals/Objectives and a Timeline for implementation	✓			Goals are for students to show progress each year through a balanced academic approach between academics and skills = a well-rounded education. PSATs as a baseline first 2 years and SATs years 3 and 4. Spark will continue to implement measurable academy goals in conjunction with state competencies and the skill sets required for successful student transition to the MCC curriculum.	
Timely and regular communication with families and stakeholders regarding school business, events.	✓			Parents and students were appreciative of the regular and timely communications, through weekly newsletters, emails, Zoom calls and phone calls.	
Disseminate Best Practices to other charter and non-charter public schools	✓			Spark has much to offer in terms of innovative practices, and they are committed to sharing their best successful practices in the future. The administration feels that it needs a first year of experience as a school before they share their best practices in the following areas: <ul style="list-style-type: none"> • Student-centered learning • Empowering Student Voice through Student Interest Surveys • Informing instruction in response to students' individual needs and preferences/interests • Implementation of hands on skills based approach 	
Complying with all federal and state health and safety laws rules and regulations: Fire Safety; Heating, Ventilation, Air Conditioning; Plumbing; Electrical; Food Service	✓			Fully compliant - as the school is located in MCC. School is up-to-date on all health and safety submissions	
Education Plan	M	D	NI	Comments	
Curriculum and Resources	✓			Comprehensive 4-year sequence of studies broken down by year and semester with an overview of each year. Curriculum Framework is shared on the school's website. Curriculum is aligned with PSATs, ALEKS, NHDOE Science Competencies, Technology aligned to MCC competencies	

				aimed towards national certification. Common Core and competencies, but no evidence of specific academic goals and objectives for student progress and meeting the NH state academic averages.	
Competencies	✓			Pedagogies are based on NH and National Competencies. Humanities competencies have been carefully laid out by the school. Math competencies are available for review on the ALEKS website.	Recommend adding the competencies to the website or the student handbook.
Academic Performance Assessments: Benchmark and ongoing	✓			Tests, Projects, Labs, PSATs, SATs and Technology Certifications	
Implementation fidelity and effectiveness of the curriculum and defined measures of competencies	✓			Extensive daily practices, pedagogical conversations with MCC and Spark staff, teacher and classroom observations and administration evaluations. These are everyday, ongoing conversations.	
Health and Physical Education	✓			<p>Spark students experience a variety of physical and health education programs, encouraging an active lifestyle and the benefits of healthy living:</p> <ul style="list-style-type: none"> • Snowshoeing • Yoga • Active day-long field trips • Health: Smoking, Date Rape, Sexually Transmitted diseases 	
Student Attainment of Expected Knowledge and Skills	✓			<p>Interviews with students and parents indicate that the student attainment of expected knowledge and skills is being met or exceeded for most of the students as measured through test/project labs/PSATs/technology certification, competencies, explorations, individual and group project work.</p> <p>College level work at a young age is challenging – students are stretched. Never Give Up is the school's motto, because that's when you stop learning. They engage in personal goals setting and the focus is on learning skills.</p> <p>The school is continuously engaged in improving the implementation of knowledge and skills instruction and</p>	

				revising curriculum and delivery in order to meet the goals of the school's mission.	
Meeting the needs of all students: Special Education IEPs, 504s, economically disadvantaged, at risk, academically needy, ELL, Homeless, migrant/refugee, neglected/delinquent	✓			In working collaboratively with sending school districts, Spark is able to meet the diverse needs of all their students.	
Public access to curriculum and policies	✓			Other than competencies, Spark posts all resources and public documents, including policies and curriculum, for community members, parents and students to access: <ul style="list-style-type: none"> • in virtual form, • in person, • through the school's website. Links to competencies are available on the website.	
Daily/Weekly Schedules	✓			Included in resource materials	
Supplemental Programming (Enrichment, Supplemental Support)	✓			Spark provides many experiences to supplement the curriculum: <ul style="list-style-type: none"> • exploration days, • field trips, • service-learning projects, • symposium events, • MCC programs, • student interest inventories to help connect students to real life experiences and to help design individualized work This process was continued through the months of remote learning.	
Closing Achievement Gaps		✓		Spark is currently establishing baselines to measure program effectiveness and individual student needs, using PSATs for grades 9 and 10, and SATs for grades 11 and 12.	
Annual School Program Review and Needs Assessment to inform curriculum and instruction	✓			This is an ongoing process that the school is engaged in, through review of student assessments, staff meetings, staff evaluations.	Recommend adding this process to the Accountability Plan as an annual year-end review to ensure

					progress towards the school's goals as a continuous cycle of school improvement.
Fiscal Management	M	D	NI	Comments	
Whose responsibility?	✓			The finance committee and the director of the school monitor internal controls and provide timely and accurate reporting of the school's financial status.	
Financial Position	✓			The school's sustainability report and Board Meeting minutes and budget indicate that the school was able to meet all financial obligations in the 2019-2020 school year. All financial reports are accessible to all on the school website through the posted Board minutes. The school is working toward independent financial sustainability as indicated in the sustainability component of the Accountability Plan.	
Title Programs	✓			The school is currently engaged in grant writing to use their allocated Title funds for the 2020-2021 school year.	
Timely submission of financial reports	✓			Until March, quarterly reports were submitted. Financial reporting is now required by August of each year.	
Annual Budget	✓			Submitted	
State and Federal Funding and the responsible use of public funds	✓			Identified in the fiscal reports in the Board meeting minutes and in the annual budget.	
Fundraising Revenue	✓			Due to zero (0) charter school startup funds available, Spark Academy raised a substantial amount of funding through partnerships, grants, gifts and unrestricted donations to open the school and operate for the first year. There is a list of activities and expected revenues in the fundraising plan. This plan is a component of the school's Accountability Plan.	Recommend further break-down of each goal into objectives that identify specific tasks/steps/strategies to achieve the outcomes. Also recommend delegating tasks and responsibilities to board committees and members, and school staff members.
Sustainability	M	D	NI	Comments	
School Sustainability Systems in place	✓			A great start to the planning process, with a list of strategies to accomplish the sustainability goals. These goals have been added to the school's Accountability Plan which is awaiting Board of Trustees approval.	Recommend further break-down of each goal into objectives that identify specific tasks/steps/strategies to achieve the outcomes. Also recommend delegating tasks and

					responsibilities to board committees and members, and school staff members.
Relationships with sending districts	✓			Positive relationships with resident districts for transportation and special education.	Recommend building upon these relationships for other collaborative events, for example, professional development, students engaging in extracurricular activities that are not available at Spark.
Plans for Fundraising	✓			In the Accountability Plan, there is an action plan with a list of funds to be raised outside of Federal and State grants. This plan is awaiting Board of Trustees approval.	Recommend further break-down of each goal into objectives that identify specific tasks/steps/strategies to achieve the outcomes. Also recommend delegating tasks and responsibilities to board committees and members, and school staff members.
Developing Partnerships	✓			Spark currently has several industry partners and is planning to expand community outreach to develop additional partners as students begin to enter into career explorations, apprenticeships and internships. This is a component of the Accountability Plan.	
Faculty retention and recruitment	✓			The school has a comprehensive benefits package and professional development plan that will attract and retain staff.	
Family and Community Engagement	✓			Many opportunities for parents to get involved in the school community through volunteering. The school does a thorough job with their communication strategies to engage families and the community, and has plans to increase their outreach. They sent 2 pandemic surveys to families to help make future decisions.	
Student, teacher, family surveys	✓			2 survey were undertaken and results were used to revise the remote learning program.	Recommend end of year surveys as well as during the year to gain a full year perspective from staff students and families.

			Student interest inventories survey students to determine their interests – this data is then used to connect students to real life experiences.	
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Christina G. White

[REDACTED], Hopkinton NH 03229
[REDACTED]
[REDACTED]

August 21, 2020

To Whom It May Concern:

I am pleased to submit my application for the New Hampshire State Department of Education Division of Program Support Professional Standards Board as a layperson member. I have been dedicated to educational equity and access and have served a variety of positions throughout my career. As the Director of the Northern New England Young Inventors' Program, I collaborate with educators, locally and nationally, to develop meaningful initiatives to enhance STEM experiences for students in grades K-12. I develop and implement invention curriculum and facilitate workshops to implement the program in classrooms and virtual learning platforms, while also leading activities for young inventors.

I am truly committed to supporting professional growth and best practices for educators. When I heard of this vacancy, I was immediately interested in applying. As a life-long educator, membership will allow me to take a more active role in the development of educational practices and the profession overall. Not only will I directly contribute to the important conversations and decisions that drive New Hampshire's educational framework, but the experience will also allow me to have a deeper understanding of issues that affect educators so that I can adapt my own work to strengthen my efforts to improve outcomes for both teachers and students.

Over seventeen years of administering educational programs has honed my skills in working collaboratively with organizational leaders, K-undergraduate academic personnel, students and families. I have developed K-12 curriculum in variety of subject areas; overseen strategic planning and execution of programs and competitions; and designed and led professional development workshops; and built partnerships with local and national organizations to align goals and support missions. In addition, I have a long history of working with and supporting underserved populations to advocate for educational equity and opportunities. My experience as an AmeriCorps*VISTA and my time with Breakthrough Manchester at The Derryfield School in particular, have raised my keen awareness of cultural barriers. For this reason, I am able to incorporate cultural competency into programming as a best practice to achieve results among these populations.

I am confident that my professional background, combined with my sincere appreciation for education, will allow me to contribute with integrity and purpose. I would be honored to serve my community and state as a member of the Professional Standards Board.

Should you wish to contact me, please email me at cggwhite@gmail.com or call me at (603) 630-4126.

Sincerely,



Christina G. White

Christina G. White

[REDACTED], Hopkinton NH 03229
[REDACTED]
[REDACTED]

EDUCATION:

BROWN UNIVERSITY, Providence, RI

Bachelor of Arts in Human Biology, May 1999 GPA: 3.5

PROFESSIONAL DEVELOPMENT AND LEADERSHIP EXPERIENCE:

In Search Of Greatness (Gabe Polsky film)

National Educator Panelist: Creativity From the Educator Perspective, April 2020

https://m.facebook.com/story.php?story_fbid=2638078606516282&id=822451614592955&_rdar__ftid=2638078606516282

Massachusetts Educational Opportunity Association Fall Conference 2017

Presenter: JSHS-STEM Competition Opportunity for Precollege Students, Fall 2017

New Hampshire School Counselors Association, Member, 2014-2015

New Hampshire College and University Council, Participant, 2009-2014

National Honors Society New Hampshire Chapter Spring Conference

Presenter: Breakthrough the Achievement Barrier, Spring 2013

National Education Opportunity Association, Member, 2004-2012

College Board New England Regional Forum, Participant, Spring 2010

Presenter: Project CIAO (College is an Option), Spring 2003

Campus Compact AmeriCorps*VISTA Training, Participant, July 2002-July 2003

PROFESSIONAL EXPERIENCE:

DIRECTOR, NORTHERN NEW ENGLAND YOUNG INVENTORS' PROGRAM

Feb. 2019-Present

The Academy of Applied Science, Concord NH

- Lead K-12 project-based STEM learning experience for educators, students and families across New Hampshire, Massachusetts and Vermont through outreach and direct management of program
- Develop and implement curriculum to meet national and state education standards focused on direct student engagement in STEM activities to foster 21st century skill sets
- Guide educators through workshops and professional development to integrate invention education in classrooms and through virtual learning platforms
- Plan and execute Northern New England Invention Convention which brings together 300 K-12 inventors and over 700 participants for regional STEM competition; coordinate all aspects of event including venue and vendor selection, competition agenda and scheduling, recruitment and direction of judges and volunteers, and implementation of rules and guidelines to ensure fair and transparent practices and distribution of awards
- Manage data to assess program at all levels; maintain database of constituents, create and maintain online registration and evaluation
- Contribute to marketing and communications efforts; write content, design materials, and provide data to support marketing materials, website development, and social media tools
- Responsible for program sustainability and participate in advancement and fundraising activities
- Collaborate with national network of invention education affiliates and serve leadership roles within the Invention Convention Worldwide consortium
- Create and operate within an annual budget
- Seek new opportunities to build relationships with mission aligned organizations and leaders to expand program to students and schools throughout the region

**NEW HAMPSHIRE STATE DEPARTMENT OF EDUCATION
DIVISION OF PROGRAM SUPPORT**

PROFESSIONAL STANDARDS BOARD

APPLICATION FOR MEMBERSHIP

(Please type or print)

NAME: Christina White

WORK ADDRESS: Director, Northern New England Young Inventors' Program, Academy of Applied Science, 2 1/2 Beacon Street, Concord, NH 03301

(please include position/title)

LENGTH OF SERVICE: 1 1/2 years as Director of NNE YIP

WORK TELEPHONE: (603) 228-4530

WORK EMAIL: twhite@aas-world.org

HOME ADDRESS: [REDACTED], Hopkinton, NH 03229

HOME TELEPHONE: (603) [REDACTED]

PERSONAL EMAIL: [REDACTED]@gmail.org

Please attach:

1. A resume that includes educational preparation, location(s) and date(s); area(s) of certification; professional experiences; honor and awards; and contact information for 3 professional references
2. A statement describing why you wish to serve on the professional standards board

SIGNATURE: _____ **DATE:** _____

Please submit the completed application form POSTMARKED by June 30, 2021 to:

Drew Cline, Chairman, New Hampshire State Board of Education, 101 Pleasant Street, Concord, NH 03301 or email it to credentialing.docs@doe.nh.gov.

PROJECT MANAGER, JUNIOR SCIENCE & HUMANITIES SYMPOSIUM PROGRAM

Nov. 2018-Feb. 2019

National Science Teachers Association, Arlington, VA

ASSISTANT DIRECTOR, JUNIOR SCIENCE & HUMANITIES SYMPOSIUM PROGRAM

Nov. 2015-Oct. 2018

The Academy of Applied Science, Concord NH

- Administered JSHS program, a STEM competition, sponsored by the U.S. Army, Navy and Air Force through strategic planning and execution of regional and national symposia to align with sponsoring organization goals
- Adhered to requirements of government contract through monthly meetings, reports of program activities and outcomes, data, and budget
- Supported 47 regional JSHS programs; established program rules and guidelines to ensure fair and efficient practices, provide innovative resources, shared best practices, webinars and published tutorials, and outreach to increase number of participants
- Researched like-minded organizations for potential partnerships and establish sustainable relations with these organizations to meet program objectives
- Acted as Scholarship Administrator to oversee authorization and distribution of funds, eligibility, and timely delivery of payment; advise over 2000 scholarship recipients
- Planned and executed National JSHS competition for 500 participants: students, teachers, DoD and other STEM professionals, and guests; secure program venue and vendors, schedule symposium sessions, solicit and train volunteers, engage alumni and coordinate travel and transportation
- Managed Cvent Event Management Software for JSHS regional and national competition data collection and evaluation and assessment to measure outcomes
- Assisted development of marketing and outreach materials and collaborated on redesign of program website

DIRECTOR OF ADULT SERVICES

Sept. 2014-Mar. 2015

Parker Education, Concord NH

- Directed start-up program to assist young adults in transition; mentored clients in college and career planning and life coaching
- Hired and supervised administrative assistant to facilitate program and company duties
- Served on leadership team to advise CEO on program and business strategies, marketing, personnel, and budget
- Fostered new relationships with academic institutions and organizations to increase services and build client base
- Served as college and transition counselor for Parker Academy (grade 6-12 school); produced and delivered project-based curriculum focused on college and career planning and financial aid

COLLEGEBOUND COORDINATOR

June 2004- Aug. 2014

Breakthrough Manchester at The Derryfield School, Manchester, NH

- Administered year-long program for underserved students and pre-professional teachers; collaborated to direct 8-week intensive summer school including scheduling, facilities use, communication and outreach, supply inventory and event planning
- Advised underserved middle and high school students and families through direct advocacy and communication with school district personnel to support academic and leadership development for students in preparation for high school and college
- Developed college access curriculum for national Breakthrough Collaborative in collaboration with national and affiliate staff
- Sought new and sustained existing community relations; created and maintained national and local partnerships for enrichment opportunities for students and alumni
- Supervised and trained corps of pre-professional teaching fellows and all program volunteers in topics of educational equity, instructional design, and safety
- Managed personnel files and database of over 1500 constituents; tracked, assessed, and evaluated academic performance data to improve outcomes; produced reports
- Taught high school environmental science elective courses in alignment with core standards; created and graded assessments, monitored progress, and implemented differentiated instruction

ADMISSIONS RECRUITER

Sept. 2003-Apr. 2004

New Hampshire Community Technical College-Manchester, Manchester, NH

- Counseled prospective students in enrollment and program selection to support career goals
- Designed and led outreach program for underserved students focused on value of attending college

AMERICORPS*VISTA, COMMUNITY SERVICE COORDINATOR

July 2002- July 2003

New Hampshire Community Technical College-Manchester, Manchester, NH

Campus Compact for New Hampshire, Concord, NH

- Directed Office of Community Service to oversee all aspects of service and volunteerism
- Consulted Dean of Academic Affairs on implementation of service-learning programs across college

OTHER INTERESTS:

Brown University Alumni Interviewer, 2008-Present

Professional Ski Instructor of America, Level III Ski Instructor, 1992-Present

High School Varsity Coach: Women's Lacrosse, Men's & Women's Cross Country Running 2004-2012

Merrimack River Greenway Trail Board of Trustees, 2014-2016

REFERENCES:

Sara Munro, Communications Director, Academy of Applied Science, Concord, NH

smunro@aas-world.org

(802) 363-5327

Doris Cousens, Former Director, Junior Science & Humanities Symposium Program; Academy of Applied Science, Concord, NH

doriscousens@comcast.net

(603) 731-4433

Kate Erskine

Former Executive Director, Breakthrough Manchester at The Derryfield School, Manchester, NH

Current Faculty, Mountain View Middle School, Goffstown, NH

kate.erskine@gmail.com

(603) 867-1451

NEW HAMPSHIRE STATE DEPARTMENT OF EDUCATION
DIVISION OF PROGRAM SUPPORT

PROFESSIONAL STANDARDS BOARD

APPLICATION FOR MEMBERSHIP

(Please type or print)

NAME: Christopher Benedetti

WORK ADDRESS: Associate Professor of Educational Leadership, Plymouth State University, MSC 38, 17 High Street, Plymouth, NH, 03264

(please include position/title)

LENGTH OF SERVICE: 22 years in education; 3 in NH

WORK TELEPHONE: (603) 535-2308

WORK EMAIL: cjbenedetti@plymouth.edu


HOME ADDRESS: [REDACTED], Concord, NH 03301

HOME TELEPHONE: [REDACTED]

PERSONAL EMAIL: [REDACTED]@yahoo.com

Please attach:

1. A resume that includes educational preparation, location(s) and date(s); area(s) of certification; professional experiences; honor and awards; and contact information for 3 professional references
2. A statement describing why you wish to serve on the professional standards board

SIGNATURE: Dr. Chris Benedetti  Digitally signed by Dr. Chris Benedetti
Date: 2020.08.07 12:55:30 -04'00' DATE: 8/7/2020

Please submit the completed application form POSTMARKED by June 30, 2021 to:

Drew Cline, Chairman, New Hampshire State Board of Education, 101 Pleasant Street, Concord, NH 03301 or email it to credentialing.docs@doe.nh.gov.

CHRISTOPHER J. BENEDETTI

• Concord, NH 03301 • cjbenedetti@plymouth.edu

EDUCATION

March 2001 - May 2008:	Ph.D. Degree FL Major: Leadership and Education	Barry University	Miami Shores,
June 1999 - August 2000:	M.S. Degree Major: Educational Leadership	Nova Southeastern University	Orlando, FL
August 1993 - April 1997:	B.S. Degree Major: English Education	Florida State University	Tallahassee, FL

HIGHER EDUCATION EXPERIENCE

June 2017-Present:	Associate Professor, Education Leadership, Learning, Plymouth State University and Curriculum		
July 2016 - May 2017:	Education Department Chair	Western State Colorado University	
July 2013 - May 2017:	Assistant Professor, Educational Leadership	Western State Colorado University	
August 2011 - March 2012:	Adjunct Undergraduate Faculty	Trident University-Online	
August 2008 - May 2013:	Adjunct Undergraduate and Graduate Faculty Campus	University of Phoenix-CFL	
June 2005 - June 2013:	Adjunct Graduate Faculty	University of Phoenix-Online	

K-12 EDUCATION EXPERIENCE

July 2011 - December 2012:	Principal <i>K-8School</i>	<i>Diocese of Orlando Schools</i>	Lakeland, FL
July 2003 - June 2011:	Assistant Principal and Principal <i>Elementary and Middle School</i>	<i>Orange County Public Schools</i>	Orlando, FL
July 2002 - June 2003:	Assistant Principal FL <i>K-8School</i>	<i>Diocese of Orlando Schools</i>	Winter Haven,
August 1997 - June 2002:	Language Arts Teacher and Dean <i>Middle and K-8Schools</i>	<i>Orange County Public Schools</i>	Orlando, FL

K-12 EDUCATION CERTIFICATIONS HELD

Florida Principal: K-12
Florida Educational Leadership: K-12
Florida English Teacher: 6-12
Florida English Teacher: Middle School Endorsement

Florida Performance Management System (FPMS)
Florida Change Toolkit Trainer
Ruby Payne Poverty Awareness Trainer

PUBLICATIONS

- Benedetti, C. (2020). Ethical dilemmas: Finding the right behavior in college life. In D. Mackey & K. Elvey (Eds.), *Society, ethics, and the law: A reader*. Burlington, MA: Jones and Bartlett Learning.
- Renga, I., & Benedetti, C. (Eds.). (2018). *Sports and K-12 education: Insights for teachers, coaches, and school leaders*. Lanham, MD: Rowman & Littlefield.
- Benedetti, C. (2016). The trouble with grit. *Phi Delta Kappan*, 97(7), 80.
- Benedetti, C. (2015). Online instructors as thinking advisors: A model for online learner adaptation. *Journal of College Teaching & Learning*, 12(3), 171-176.

PRESENTATIONS

- Benedetti, C. (2019, April). Experientialism vs. existentialism: Doctoral mentoring at a distance. In C. Uttley (Chair) *Multiple perspectives of mentoring in an EdD summer cohort model*. Symposium presented at the New England Education Research Organization Annual Conference, Portsmouth, NH.
- Renga, I., & Benedetti, C. (2019, April). *Crossing the chalk line: Perspectives on sports culture and K-12 education*. Symposium presented at the American Educational Research Association Annual Meeting, Toronto, Canada.
- Benedetti, C. (2019, March). *Predicting burnout based on job satisfaction in teachers working in high-poverty elementary schools*. Paper presented at the Critical Questions in Education Conference, Savannah, GA.
- Benedetti, C. (2018, November). *Gender-based inequities in the leadership perceptions of school principal interns*. Paper presented at the University Council for Educational Administration Annual Convention, Houston, TX.
- MacDonald, S., & Benedetti, C. (2018, November). *Gender and principal job satisfaction: Examining differences in job autonomy and professional support*. Paper presented at the University Council for Educational Administration Annual Convention, Houston, TX.
- Benedetti, C. (2018, October). *Predicting the potential for role congruity for aspiring female school leaders*. Paper presented at the Northeastern Educational Research Association Annual Conference, Trumbull, CT.
- MacDonald, S., & Benedetti, C. (2018, October). *Understanding the relational factors of professional support for principals*. Paper presented at the Northeastern Educational Research Association Annual Conference, Trumbull, CT.
- Benedetti, C. (2017, December). *Examining grit as an indicator of school leadership*. 2018 Oxford Education Research Symposium, Oxford, England.
- Benedetti, C. (2017, February). *Promoting department chair succession using the three "E"s*. 34th Annual Academic Chairpersons Conference, New Orleans, LA.
- Benedetti, C. (2016, June). *Learner adaptation and empowerment: A case study of learning styles and online learning*. 2016 Clute Institute International Education Conference, Venice, Italy.
- Benedetti, C. (2015, February). *Overcoming organizational chaos in schools through team-based productive conflict*. 18th Annual American Association of Behavioral and Social Sciences Conference, Las Vegas, NV.
- Benedetti, C. (2015, February). *Parent as teacher, child as student: A case study of a unique dichotomous relationship*. 27th Annual Ethnographic and Qualitative Research Conference, Las Vegas, NV.
- Benedetti, C. (2014, August). *Enhancing professional development design using teachers' learning styles*. 2014 One Voice International Conference for Educators, Denver, CO.
- Benedetti, C. (2014, January). *Online instructors as thinking advisors: A model for learner characteristic adaptation*. 2014 Clute Institute International Education Conference, Orlando, FL.
- Benedetti, C. (2009, January). *A comparison between beginning and experienced elementary teachers on burnout and job satisfaction*. 2009 Phi Delta Kappa Annual Research Day, Miami Shores, FL.
- Benedetti, C. (2007, April). *A progressive support model for retaining new teachers*. 2007 National Effective Schools Conference, Scottsdale, AZ.

Benedetti, C. (2004, November). *The impact of collective leadership and applied influence on how teachers respond to policy implementation*. 49th Annual Meeting of the Florida Education Research Association, Tampa, FL.

GRANTS AND AWARDS

December 2015:	Awarded the Professional Activity Fund Grant for \$500 to attend an academic conference
October 2015:	Awarded (co-author and project director) the Federal ESEA Improving Teacher Quality Grant for \$210,000 to fund increasing statewide outreach to improve teacher recruitment in rural school districts
September 2015:	Awarded the Professional Activity Fund Grant for \$1600 to present at an academic conference
November 2014:	Awarded the Professional Activity Fund Grant for \$796 to present at an academic conference
November 2013:	Awarded the Professional Activity Fund Grant for \$895 to present at an academic conference
September 2010:	Received the Faculty of the Year award from University of Phoenix, Orlando Campus
March 2006:	Received the Young Educator of the Year from Phi Delta Kappa
April 2004:	Awarded (co-author) the US Department of Education 21st Century Learning Grant for \$720,000 to fund the development of after school programs for four Title I elementary schools

UNIVERSITY, STATE, AND OTHER SERVICE ACTIVITIES

April 2020 - Present:	Member, PSU Fall Reopening Task Force
September 2019 - Present:	Member, New Hampshire Department of Education Educational Leadership Licensure Standards Task Force
August 2018 - Present:	Member, New Hampshire Department of Education Accountability Task Force
September 2017 - Present:	Member, PSU Institutional Review Board
September 2017 - Present:	Member, PSU Academic Affairs Committee
September 2017 - Present:	Book Reviewer for SAGE Publications
August 2017 - May 2017:	Member, Colorado Department of Higher Education Program Review Team
January 2015 - May 2017:	Coordinator, Colorado Consortium for Principal Preparation through the Colorado Department of Education and the Colorado Department of Higher Education
November 2015 - May 2017:	Member, Western Council for Advancing Rural Education
August 2015 - May 2017:	Member, Western Teacher Institute Committee
December 2014 - May 2017:	Chair, Western Education Faculty Search Committee
August 2014 - May 2017:	Co-Chair, Western Institutional Review Board
August 2014 - May 2017:	Member, Western Faculty Senate
November 2013 - May 2016:	Member, Western Council for Teaching Excellence
August 2013 - May 2014	Member, Western Academic Policies Committee

PROFESSIONAL ORGANIZATION AFFILIATIONS

American Education Research Association
Carnegie Project on the Education Doctorate
New England Research Organization
Northeastern Education Research Association
Phi Delta Kappa
University Council for Educational Administration

Three Professional References

Dr. Christie Sweeney

Professor Emeritus of Educational Leadership (and former PSB member), Plymouth State University

clsweeney@plymouth.edu

Dr. Saundra MacDonald

Assistant Superintendent of Schools, Rochester School District

macdonald.s@rochesterschools.com

Dr. Marcel Lebrun

Professor of Educational Leadership and Coordinator of Special Education Administrator Certification Program, Plymouth State University

mrlebrun@plymouth.edu



To Whom it May Concern:

I would like to express my interest in serving on the Professional Standards Board. I wish to serve on the Board to assist New Hampshire's efforts to monitor and manage the standards and related processes to promote quality educator preparation leading to licensure.

I am entering my twenty-third year as a professional educator. I began my career in Florida as a middle school language arts teacher, then moving into school administration as a dean, assistant principal, and principal. I am currently serving in my eighth year working with educator preparation in higher education. I served as the principal and superintendent licensure program coordinator at Western State Colorado University, which included revising the program to meet the needs of the field and collecting and reporting data to the state for program reauthorization. Through this role, I worked closely with the Department of Education and Higher Education to increase visibility and advocacy of Western's programs, which generated opportunities to lead a committee of Colorado principal preparation programs and serve on state educator preparation program reviews. As part of my role as Education Department Chair, I also served as the Certification Officer for two years and worked with the Colorado Department of Education and similar departments in other states to verify credentials the candidates earned at Western.

At Plymouth State University, I am in my second year as the principal certification program coordinator, though I worked closely with the former coordinator since I arrived in New Hampshire 2017. As coordinator, I have worked with candidates from schools and districts across the state, which has helped understand the needs for educator preparation. In addition, I have worked with CAEP and AAQEP policies and processes to ensure compliance and development, which helped to see connections with state-level standards. This work has also led to collaboration with the Division of Higher Education to clarify state approval processes for educator preparation, creating opportunities to serve on the New Hampshire Administrator License Credentials Committee. I have also recently expressed interest in serving on the state educator program review committee to further my engagement with educator preparation at the state level.

I am excited about the possibility of working with the Board to support educator preparation and licensure at the state level. I would like to thank you in advance for your time and any consideration you may give me. Please do not hesitate to contact me if you need additional information.

Sincerely,

A handwritten signature in black ink, appearing to read "Chris Benedetti".

Christopher Benedetti, Ph.D.
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New Hampshire
State Board of Education
Minutes of the August Meeting
Meeting held telephonically due to the COVID-19 State of Emergency

AGENDA ITEM I. CALL TO ORDER

The regular meeting of the State Board of Education was convened at 9:03 a.m. The meeting was held telephonically due to the COVID-19 state of emergency. Drew Cline presided as Chair

Members present: Sally Griffin, Ann Lane, Kate Cassady, Cindy Chagnon, Phil Nazzaro, Helen Honorow, and Drew Cline, Chair. Commissioner of Education Frank Edelblut and Deputy Commissioner of Education Christine Brennan were also present.

AGENDA ITEM II. PLEDGE OF ALLEGIANCE

Drew Cline led the pledge of allegiance.

AGENDA ITEM III. PUBLIC COMMENT

No written commentary was submitted for this meeting.

AGENDA ITEM IV. NONPUBLIC SCHOOL APPROVAL**A. Our Lady of Mercy Academy**

Chair Cline let the Board know that Our Lady of Mercy Academy asked to withdraw its application from the August agenda and move it to September's. Chair Cline explained that they have been waiting on their local town health inspection. All other aspects of their application appear to be complete, but they cannot be approved without the inspection.

B. Cardinal Lacroix Academy

Shireen Meskoob, NHDOE, Office of Nonpublic Schools Bureau of Educational Opportunities address the Board and explained that Cardinal Lacroix Academy is seeking to continue attendance only approval to operate. Ms. Meskoob noted that as of June's board meeting, the school had all necessary items except for its health inspection. The school has since received its inspection, which was performed by the Manchester Health Department on June 12. The Manchester Health Department recommended some corrective actions, including adjusting temperature levels of hand sinks, which have been corrected as of June 30, 2020. The Academy's report is now complete, and per the Office of Nonpublic Schools, the school has met all of its requirements to receive their continued status for attendance purposes only.

There being no questions, Ms. Meskoob proposed a motion.

MOTION: Ann Lane made the preceding motion, seconded by Sally Griffin that the State Board accept and approve Cardinal Lacroix Academy for continued attendance for the period of September 1, 2020 through June 30, 2023.

VOTE: The motion was approved by roll-call vote by State Board of Education Members Sally Griffin, Ann Lane, Kate Cassady, Cindy Chagnon, Phil Nazzaro, and Helen Honorow, with the Chair abstaining.

AGENDA ITEM V. PUBLIC HEARINGS

A. Draft Final Proposal - Vocational Rehabilitation Programs (Ed 1000)

Chair Cline gavelled in the public hearing at 10:30 AM. He noted that no one had signed up to speak but that the hearing would remain open until 11:00 AM.

AGENDA ITEM VI. LEGISLATIVE UPDATES**A. Initial Proposal - Home Education Program (Ed 315)**

Amanda Phelps, NHDOE Administrative Rules Coordinator, presented the initial proposal to the Board. As stated in the executive summary, the Department has worked closely with the Home Education Advisory Council (HEAC) to appoint a rules committee. HEAC met in June and voted to forward the rules to the State Board for approval to begin the rule-making process.

Helen Honorow asked Ms. Phelps to review the substantive changes to the proposal, along with the rationale behind them. Ms. Phelps explained that nothing substantive was added. Rather, it was a process of streamlining and cleaning up the rules for better flow, especially given that items are frequently added in response to situations that arise in the field. In addition, some items were removed because they were not necessitated by statutory requirement.

Ms. Honorow requested more clarity on rules being issued in the field, since such changes would presumably, in fact, be substantive. Ms. Phelps explained that the only statutory requirement is for parents to notify someone in the school system that they are initiating a home education program. The statute also lays out precisely how this notification should occur. The rules contained a great deal

of confusing extra details, so they were streamlined in order to better convey the simple notification requirement in the statute.

Ms. Phelps noted that her interactions with the home education community had revealed distrust of districts and the Department. In response to this distrust, it was decided to focus on providing guidance to parents as issues arise, rather than relying on a complex set of rules. For instance, if parents submit a notification but forget to include the child's date of birth, the school district has been saying that the parents did not provide proper notification; sending truancy officers to the home. The intent is to modify the system to lessen the involvement of truancy officers: if a parent makes an attempt to notify, even if it's incomplete, it will still count as notification. Going forward, such bureaucratic issues will instead be addressed through guidance from the Department or assistance from the school district.

Ms. Honorow noted that the vast majority of parents who select home education for their child want to do a good job. However, she wanted to confirm that there will still be adequate oversight to ensure that home-schooled children are safe and are, in fact, receiving a suitable education. Regarding the issue of mistrust, Ms. Honorow argued that in recent years, the State Board has had a positive relationship with the Home Education Advisory Council. She does not want the Board to abdicate responsibility for any child in the state and, as such, requested additional detail on the substantive changes, rather than simply "flow."

Ms. Phelps reiterated that the rule changes were not strictly about flow. The main purpose was both to clarify and improve flow as well as to align them with the statute and remove extraneous requirements. For example, the previous version of the rules included details like the parent's phone number, a piece of information that is not required by statute. The modified rules now contain nothing but what is required by statute. Additionally, the previous rules contained significantly more detail regarding termination of a home education program, and so the rules have been modified to align them with the statute. The rules are intended as guidelines for how to meet the statutory requirements.

Ms. Honorow asked what happens if a home-educated student wants to participate in a district program. Can the parent still refuse to provide their phone number because it's not required by statute? If so, how would parents be notified if something happens to the child while attending the program? Commissioner of Education Frank Edelblut interjected that the intent is to ensure the rules have statutory authority. He stated that Ms. Honorow is conflating two separate parts of the law in the hypothetical situation she presented. The rules on the table are designed to address only the process of initiating a home education program. If a home education student wishes to attend a public school program, there is a separate part of the statute that addresses the surrounding issues. Per statute, the sort of situation Ms. Honorow described is controlled by local school policy: home-schooled students access public school programs on the same basis as

public school students, and contact information requirements are spelled out in school policy.

Ms. Honorow pointed to the very beginning of the proposed draft, noting her confusion as to why some of the definitions are crossed out. For example, in 315.02, the words "parent" and "child" are crossed out. Commissioner Edelblut explained that the purpose of a rule is to clarify the application of the statute. In the prior version of the rules, statutory definitions were repeated throughout the document. In the revised draft, definitions are incorporated by reference to the statute: for example, 193-A:1, Roman numeral I, defines the term "child," and Roman numeral III defines the term "parent." The modifications to the rules eliminate unnecessary repetition, as well as ensuring that the rules will always be consistent with what is in the current version of the statute.

In order to clarify further, Chair Cline pointed to page 1, Ed. 315.02, Definitions. In this section, the rules reference the statutory definitions of "child," "nonpublic school," "parent," and "resident district." In addition, this section also provides definitions for terms that are not defined in statute. Commissioner Edelblut provided an example: the term "commissioner" is not referenced in the statute, but because the term is needed for the rules, this additional definition is provided in the rules.

Ms. Honorow asked why "standards applicable to a home education program" was removed at 315.01, sentence 1. Commissioner Edelblut noted that the purpose of the rule is to provide a process for uniform application of the requirement and read 193-A:3 from the statute: "The State Board of Education shall adopt rules pursuant to RSA 541-A relative to the administration of the home education program. The State Board of Education shall, in addition, to the provisions of RSA 541-A, submit any notice of proposed rule-making through 541-A:6." The first sentence spells out that this relates to the administering of a home education program, and so the rule is focused on capturing only this specific component. In other words, the law here is focusing not on "standards applicable to a home education program," but rather on the administration of a home education program.

Ms. Honorow replied that she understands but does not necessarily agree with Commissioner Edelblut's interpretation of the statute. Ms. Phelps noted that home education is not a program; rather, it is a parental choice. As such, the Department has not devised standards for home education programs. In other words, the standards are up to the parent, and the parent's only statutory requirements involve notification and assessment.

Ms. Honorow pointed to 315.04 on page 2 of the document, asking whether the commissioner is one of the participating agencies or whether it could have been a participating agency previously. Commissioner Edelblut replied that it

could, and it was. Ms. Honorow pointed out that, per the document, participating agencies have "duties and authority," which sound to her like standards and requirements. Duties and authority suggest more than just a process. Further, this paragraph lays out a series of requirements and dates by which they must be completed which, again, seems like more than a choice that parents make. Commissioner Edelblut indicated that the duties and authority spelled out in this paragraph belong to participating agencies.

Cindy Chagnon asked why the commissioner was added in the participating agencies section, since the commissioner is not himself a participating agency; he is the authority to whom the participating agencies report. Ms. Phelps replied that the commissioner was not added; it is actually listed that way in the statute. Chair Cline stepped in to clarify, referencing 193-A:4 and 193-A:5. The primary focus here is notification/truancy requirements, with only a small portion covering testing/evaluation. The Department and local district do not have any supervisory role in statute; their job is to account for every child. Commissioner Edelblut added that 193-A:5 specifies which agencies are authorized to receive notifications, and the commissioner is included in this list. The rule is simply reiterating this information about who can receive notifications; no information has been added.

Ann Lane asked why items are being repeated in this section if they have already been listed previously. Ms. Phelps responded that her first iteration did, in fact, remove everything. However, HEAC requested that some items be put back

in to ensure the requirements are completely clear to parents. Most of the reiterations that occur in the draft were requested by HEAC. Ms. Honorow asked about the frequency with which items are included in both the rules and the statute. Ms. Phelps replied that the rules are focused on clarifying the statute, and so the rules contain very few instances of repeating information that is already spelled out in the statute. Primarily, the rules point to the statute rather than reiterating the statute. Chair Cline added that 315.04 of the rules spell out the process by which a parent establishes a home education program. He believes that the HEAC wanted this spelled out in the rule because the how-to part is not clear in the statute, and the goal is to set forth a clear, comprehensible process for parents to refer to.

Kate Cassady requested clarification on one of the points Ms. Phelps made, asking whether Ms. Phelps had stated there were no guidelines at all for home schooling. Ms. Phelps noted that the Department's website has a Home Education Liaison who works with HEAC and the home education parents. What she meant in her earlier discussion of guidelines was that the Department wants to rely more on guidance to fix situations as they arise, rather than overcomplicating the rules.

Ms. Honorow asked why the Department wants to rely on guidance. Ms. Phelps responded that there are only two statutory requirements for parents and that the rules should be in line with the statute. When questions arise in very specific scenarios as individual parents go through the process, the participating

agency should provide guidance on a case-by-case basis, rather than adding extra detail to the rules. Ms. Phelps also stated that the issue of trust came up frequently during her conversations with HEAC and that it is important for the Department to start building trust again, which needs to be done through communication, not rules. Ms. Honorow asked why the parents have lost trust. Ms. Phelps reiterated that truancy officers have appeared even when parents have provided notification. She provided an additional example, citing situations in which parental requests to use school tests have been denied or in which schools demanded remuneration in exchange for the test. Chair Cline added that, in his time on the Board, complaints have been received from homeschool parents that districts were imposing requirements that are not justified or allowed under the law.

Ann Lane asked if there are any references in the rules to "home schooling" where the term needs to be changed to "home education" for consistency. Ms. Phelps replied that she has not done a thorough check of every rule but will ensure that future rule proposals will change references to "home school" to "home education."

Cindy Chagnon pointed to Ed. 315.8, asking whether annual evaluations and record-keeping are at the discretion of the parent. Chair Cline responded that the statute requires parents to provide an annual educational evaluation. Ms. Chagnon asked what happens in the case of a poor evaluation. Are parents held accountable for improvement? Commissioner Edelblut pointed to 193-A:6,

Records and Evaluation, which mandates that students must take a formally administered National Student Achievement Test. Students scoring at or above the 40th percentile are deemed to have achieved reasonable academic proficiency. If a child does not meet the requirements, the opportunity for intervention is provided.

MOTION: Phil Nazzaro made the following motion, seconded by Ann Lane, that the State Board of Education approve the initial proposal for Ed. 315, home education.

VOTE: The motion was approved by roll-call vote by State Board of Education Members Sally Griffin, Ann Lane, Kate Cassady, Cindy Chagnon, Phil Nazzaro, and Helen Honorow, with the Chair abstaining.

Chair Cline noted that he had neglected at the beginning of the meeting to read the Right-to-Know law statement regarding COVID-19/electronic meetings, and so read it at this point. Ms. Honorow noted that she did not get a response to her email about how the public hearing was noticed. Chair Cline replied that public hearings are noticed in the same manner that the meetings are noticed (people were provided a call-in number). Ms. Phelps indicated that she notified the Office of Legislative Services three weeks prior to the meeting and that the notification was posted in the Rule-Making Register, which is how all public hearings are

posted. It was also posted on the department website. Chair Cline noted that it was also contained in the agenda packet.

B. Initial Proposal ~ Chartered Public Schools (Ed 318)

Amanda Phelps stated that the rules under discussion were amended to align with RSA 194-B and to remove redundant language between the statute and the rule.

Chair Cline indicated that he has been involved in discussions on this topic with Ms. Phelps, Nate Greene, and Caitlin Davis for many months. Opinions were solicited from the charter school community and from other Board members. This batch of changes, like the home education changes, are designed primarily to ensure that the rules align more precisely and clearly with the statute and to clean up unnecessary items such as definitions.

Helen Honorow noted that in the July meeting, Ms. Phelps had stated that the Board was not provided a draft for review because there would probably be some upcoming substantive changes. Ms. Honorow requested that Ms. Phelps point out those changes in the current draft. Ms. Phelps stated that the changes she was referring to are on page 9, the Department Legal and Peer Review. These changes were made in response to RSA 541-A:29 (agency response to applications). Because the rules regarding timeliness of review of applications did

not consistently align with the statute, Ms. Phelps added that process to the rules. The Department is required to respond to an application for missing materials within 30 days and to make a decision on an application within 60 days of receiving a complete application. The peer review and legal review were added, such that an application is not complete until both of those reviews are completed. The completion of these sections starts the 60-day timeline for the Board to make its decision. Ms. Honorow asked which specific substantive changes Ms. Phelps was referring to in last month's minutes. Ms. Phelps replied that she was referring solely to the timeline for response to applications.

Ms. Honorow noted that she appreciates the desire for streamlining, but is extremely concerned that we have not taken meaningful steps to address problems that have been recognized relating to charter schools, whether they arise at the annual review or from complaints. Ms. Honorow is concerned about potential harm to students who attend schools in which specific problems have been raised and has concerns over the attention being paid to cleaning up existing rules. Chair Cline noted two prior conversations with Ms. Honorow in which he explained that the charter school rule revisions will be completed in multiple steps. The document under review represents step one, and problems with charter schools will be addressed in step two. Ms. Honorow replied that she doesn't understand why they are not moving more quickly to remediate problems and wanted to place this concern on record.

Ms. Honorow also asked Nate Greene to address the changes to the makeup of the three peer review members. Per Mr. Greene, the peer review group was changed for two reasons:

- 1) To remove the Department employee requirement. Since the only charter school Department employee, Jane Waterhouse, already does a full application review, a second reviewer was needed for the peer review process.
- 2) It has been difficult finding potential committee members who have any significant experience or knowledge of charter schools.

Ms. Honorow asked whether Jane Waterhouse's report will still be part of the review, to which Mr. Greene replied yes.

Ann Lane noted that, for the initial application, there is no requirement that the receiver notify the applicant of receipt. Timeframes for notification are provided at other places in the rule, but this requirement seems to be missing for the initial application. It seems like an important omission, given how time-sensitive the applications are. Ms. Phelps pointed to page 9 of the proposal, number 10b, which states, "Within ten days of initial filing, the Office of Charter Schools shall notify the applicant of receipt of the application materials, as well as any missing materials required by RSA 193-B:3." This timeline is required by statute. Ms. Lane indicated

that she was actually confused by a passage referencing July 30. Ms. Phelps replied that this date refers to the local board process, over which the Department has no jurisdiction. The local school boards are not required to provide notification of receipt, so procedures will differ from board to board.

Ms. Lane also pointed to a grammatical concern in the following passage on page 6a, under Ed. 318.09: "An applicant seeking State Board authorization for a charter school shall submit a letter of intent to submit a charter school application to the Department Office of Charter Schools, which...." The word "which" does not apply to what is listed below. Chair Cline explained that there are two crossed out lines following "which," so the complete phrase is actually "which shall include."

Chair Cline noted some additional wording issues:

- Page 2, 318.06, paragraph A - In the passage, "The school board, by July 1 of the year preceding intended operations," should "operation" be changed to "opening"? Ms. Phelps agreed to the change.
- Page 4, 318.07, paragraph A2, should the word "proposed" be removed from the phrase "for the proposed application,"

since it is referring to the application, not a proposed application? Ms. Phelps agreed to the change.

- Page 5, in the next-to-last paragraph: "Provide a written notification of any suggested additions or amendments." The word "suggested" might be correct, but Chair Cline wonders if "required" might be a more precise term. Nate Greene agreed with Chair Cline's point, but said that the word "suggested" comes directly from the statute.
- Page 9, paragraph D, next-to-last sentence: "Conditional upon the availability of funds, the Department shall provide a small stipend and travel cost." Since the provision of funds is contingent upon the availability of funds, is "shall" the correct word legally, or should it be changed to "may"? Chair Cline found it confusing as to who determines whether funds are available. Ms. Phelps agreed with Chair Cline's reasoning, stating that it could probably be changed to "may." Alternately, it could be changed to Chair Cline's suggested wording: "the Department shall, if funds are available." Cindy Chagnon asked whether the phrase should be included at all, given that the Department always has a limited budget and may be unlikely to ever pay. Chair Cline thought it should be

included to accommodate cases where, e.g., the charter school gets a federal grant, and the school is flush with cash. Ms. Chagnon replied that she does not want the wording to set up false expectations that people are going to get paid; Chair Cline noted that this is partly why he has issues with using the word "shall." Nate Greene stated that he had a conversation with the business office around this issue in an attempt to set up a procedure for the stipend. It was proposed to create a line item under the Office of Charter Schools' budget for this specific purpose. Caitlin Davis noted that they are comfortable changing the wording to "may." Further, this passage was included in the rules in an attempt to lure higher quality reviewers, which has been challenging in the past.

- Page 11, 318.01, paragraph D: "If the Board determines that more information is necessary to make a decision regarding the approval or denial of the application, upon written agreement by the applicant...the Board shall extend the decision." This requirement of written permission could prevent the Board from extending decision deadlines on the spot during a Board meeting, for instance. He proposed changing the wording to "written or in-person agreement." Ms. Phelps argued that it is probably fine if the applicant is

testifying in a recorded public meeting, but Chair Cline felt that the rule should actually spell it out. Ms. Phelps proposed massaging this language before the public hearing.

Kate Cassady raised a concern with consistency on page 6, 318.08-A, where "approval" is crossed out and replaced with "authorization," because other areas in the rules use the word "approve" (e.g., page 11 at the top and 318-11). Mr. Greene replied that there are two different processes in the statute. Either a local school board or the State Board can authorize a charter school, but in both cases, the application still ultimately goes to the State Board for approval. Thus, the language is meant to convey the distinction between a local board authorizing a charter school and the State Board giving its final approval.

Chair Cline continued with his list of wording issues:

- Page 13, 318.13, paragraph A, says that applications shall come to the State Board no later than one year before the original charter is set to expire. Is the one-year time period in statute or can this time period be shortened in order to help charter schools out a bit? He also raised a concern with the following passage from paragraph B, "The first renewal of the application shall consist of the school's fourth-year annual report with the cover letter." The term "consist of" suggests that the annual report will

be the only item in the application. Chair Cline proposed replacing "consist of" with "include." Mr. Greene replied that the term "consist of" may in fact be in the statute, which would require a legislative change.

- Additional document requirements are included later on the same page. Chair Cline flagged number 3, "including pertinent yearly accountability materials submitted to the charter school office," noting that these materials might need to be more clearly defined.
- Page 14, paragraph D references a proposed budget for the following school year. Chair Cline suggested adding "a summary of the last five years' budget, the current year's budget, and a proposed budget for the following school year," because it would be helpful for the Board to see how the school has spent their money and done their fundraising.
- Re: 318.14, B3, "whether the school is meeting goals for student attainment of expected knowledge and skills," Chair Cline thought it would be useful to include something along the lines of "a comparison of the school's academic performance over the last five years, with resident district, the state, and peer students, and then a summary of the student's academic growth." He

would place particular emphasis on seeing growth in charter school students. Ann Lane noted that we do not ask this information of public schools, to which Chair Cline replied that we should. Ms. Lane agreed that such information is very useful, but perhaps the Board should not be placing a burden on charter schools that is not placed on public schools. Chair Cline felt that if the Department compiled the data, then the information would be available for review at renewal time without burdening the schools. Cindy Chagnon disagreed somewhat with Ms. Lane, arguing that it would be an asset, not a burden, for charter schools. It would allow the many charter schools for at-risk children to focus on growth, given that their state adequacy scores often fall below even their own district. Mr. Greene indicated that the entire section on renewal is going to be tackled in step two, so not much has been changed in the section as of yet. Mr. Greene checked the statute, which states that charter schools may be renewed using the same process as an initial school. The use of the word "may" and the absence of additional statutory language governing the renewal process seems to give the Department a good deal of leeway in crafting the rules around the process.

Sally Griffin asked Mr. Greene if he could furnish a schedule of the planned phases and what each phase will include. Mr. Greene responded that the current phase is focused on aligning everything with statute and cleaning up the approval processes (which is why most of the revisions on this first pass occurred in the first half of the rules). The next phase will focus on two sections in the rules--the charter school renewal process and the process for charter revocation--that need substantial content revision. The statute on approving charter schools is four pages long, but the statutes on renewals and revocations comprise about a sentence or two each, which will give the Board more discretion and wider latitude in writing these rules. Ms. Griffin requested a formalized timeline for the process, which Mr. Greene agreed to put together.

Ann Lane asked if sections in the rules covering oversight and authority will be addressed. Mr. Greene agreed to look into the issue.

Kate Cassady proposed that the Board organize a retreat to work on the more detailed aspects involved in the next phase. Chair Cline agreed to schedule a retreat, hopefully in person, relatively soon that would involve representatives from charter schools.

Chair Cline completed his list of proposed revisions:

- Page 15, 318.145, about halfway down the page, third line in the paragraph: "if the commissioner makes a recommendation to revoke a charter, it shall give the trustees at least 90 days." He proposed changing the word from "it" to "the Department" or "the commissioner" or, if "it" refers to the recommendation, the passage needs to be reworded to make that clear. Mr. Greene agreed to clean up the passage.
- In 318.16, should "pursuant to RSA 189" be changed to "in accordance with RSA 189"?

MOTION: Cindy Chagnon made the following motion, seconded by Mr. Nazzaro, that the State Board of Education approve Ed. 318, Chartered Public Schools, as amended.

VOTE: The motion was approved by roll-call vote by State Board of Education Members Sally Griffin, Ann Lane, Kate Cassady, Cindy Chagnon, Phil Nazzaro, and Helen Honorow, with the Chair abstaining.

C. Conditional Approval Response - How to Obtain a New Hampshire Educator License (Ed 505)

D. Conditional Approval Response - Requirements for Specific Educator Endorsements (Ed 506 & Ed 508)

E. Conditional Approval Response - Renewal and Denial of Credentials (Ed 509 & Ed 512 - Ed 513)

F. Conditional Approval Response - Special Education Teachers (Ed 507.40 & Ed 507.41)

I. Credential Standards for Educational Personnel (Ed. 501-04)

Chair Cline proposed bundling some of the conditional approval items together. Ms. Phelps felt that this approach made sense. Chair Cline noted that one item, Credential Standards for Educational Personnel, came in late and was not provided in the initial meeting packet, and that it is a conditional approval response just like the other items under consideration.

All five of the rules (Ed. 501 through Ed. 513, plus Ed. 507.40 & Ed. 507.41 for special education teachers) were approved as a final proposal by the State Board and submitted to the Office of Legislative Services (OLS). OLS responded with comments, the most substantive of which was the use of the term "license," as opposed to "certificate." Each proposal has a few strikeouts and bold italic language that Ms. Phelps had to include in order to avoid objections from the Joint Legislative Committee on Administrative Rules (JLCAR); none of these are substantive.

All five rules went to JLCAR and were postponed several times because the statutes say "certificate" and "certification," whereas the Department wished to use the term "license." At the July 16 JLCAR meeting, JLCAR voted unanimously to allow the Department to use the term "license" in the rules, as long as the Department works with the legislature to fix the language in the statute. Approximately seven statutes use the term "certificate" instead of "license," so the Department will work on that in preparation for the next legislative session.

Chair Cline clarified that most regulatory boards use the term "license" for the highest level, where "certificate" legally tends to mean something less than a license.

MOTION: Phil Nazzaro made the following motion, seconded by Sally Griffin, that the State Board of Education approve as a bundle all of the following conditional approval responses:

Ed 505 ~ How to Obtain a New Hampshire Educator License

Ed 506 & Ed 508 ~ Requirements for Specific Educator Endorsement

Ed. 509 & Ed 512-513 ~ Renewal and Denial of Credentials

Ed 507.40 & Ed 507.41 ~ Special Education Teachers

Ed. 501- Ed 504 ~ Credential Standards for Educational Personnel

VOTE: The motion was approved by roll-call vote by State Board of Education Members Sally Griffin, Ann Lane, Kate Cassady,

Cindy Chagnon, Phil Nazzaro, and Helen Honorow, with the Chair abstaining.

G. Adopt - Learn Everywhere Program (Ed 1400)

Amanda Phelps provided an overview of the rules. The Learn Everywhere rules are being proposed for adoption by the State Board. The rules received a final objection from JLCAR on October 17, 2019. JLCAR also voted to sponsor a joint resolution that was introduced in the 2019 legislative session, within the timeframe allowed by law. However, final legislative action was not taken on the resolution within the statutory 90 calendar days, allowing the Board to adopt the rule over the objection of the committee.

Commissioner Edelblut supplied further detail, noting that a request was granted by JLCAR to extend the 90-day calendar through the end of the legislative session so that the legislature would have an opportunity to act on it. It was not acted on, leaving the Department open to adopt the Ed 1400 rules for the Learn Everywhere program. Commissioner Edelblut also discussed RSA 193-E:2-a 5b, a law that was passed which tasks the State Board of Education to adopt rules pursuant to 541-A, relating to approval of alternative programs for granting credit leading to graduation. Commissioner Edelblut noted that he is excited to implement the Learn Everywhere program in light of the pandemic-related restrictions.

Cindy Chagnon asked if the failure to act within 90 days occurred as a result of the pandemic and whether the legislature would have voted on the issue had COVID not interfered. Commissioner Edelblut does not believe that COVID was a factor in the legislature's failure to vote, because the legislature was back in session before the extended deadline ran out.

Helen Honorow noted her understanding that the Senate Education Committee did meet and voted to approve the legislation; however, COVID prevented the committees in the House from meeting. Chris Bond, NHDOE Attorney, did not know whether this information was correct or not.

Ms. Honorow pointed out that the vast majority of comments received, particularly from districts and educators, opposed these rules. JLCAR's final objection found that the Department was acting outside of its legislative authority. She noted the contradiction between the day's recurrent theme of ensuring that rules adhere to statute, while at the same time proposing to exceed their authority in this case. She does not believe these rules will be helpful or will increase flexibility for districts, a majority of whom do not want to move in this direction. She argued that the districts need the Department to be focused on providing them the resources to be able to provide remote education. Ms. Honorow strongly urges against adopting these rules.

Chair Cline countered that JLCAR's stance--that the Department lacks the authority because it violates RSA 193-E:2 5b--is, legally speaking, demonstrably incorrect. JLCAR, he argued, has the process backwards for how one receives a graduation credit. JLCAR's position is that you engage with the curriculum at the local level, then get your competency, then get your credit. However, this is not the way it works under the law and the rules, as clearly demonstrated in 306. He noted that New Hampshire operates under a competency-based system, meaning that students get graduation credit for demonstrating competency, regardless of the curricula taken by the student. He then read from the statute:

- 306.27-E: "Graduation [is] based on mastery of required graduation competencies, as demonstrated through the accumulation of credits."
- 306.27-F: "Credits shall be based on the demonstration of district and/or graduation competencies, not on time spent achieving these competencies."
- 306.27-G: "Students may receive acknowledgement of achievement for graduation competencies through student demonstration of a collection of work or other assessment evidence gained through prior learning activities."
- 306.27-K:6: "Students shall be provided courses in a classroom setting that will enable them to demonstrate achievement of graduation competencies." Chair Cline added that courses are

created to demonstrate competencies. "Students shall not be required to take these courses in order to demonstrate achievement of graduation competencies but may engage in distance education programs to demonstrate achievement. Duplicate, equivalent, or additional courses in these program areas may be offered through distance education and extended learning opportunities or other alternative methods."

Chair Cline asserted that these provisions have been part of the rules for a long time and that the Learn Everywhere program is another alternative method for students to be able to demonstrate competencies and receive credit based on the Department's existing process. Learn Everywhere is not intended to replace curriculum, nor is it reaching into the district and taking away their curriculum authority. JLCAR has ignored the Department's numerous attempts to explain this position.

Ms. Honorow reiterated that JLCAR is, under statute, required to make an analysis of the rules, and their analysis determined that the Board had exceeded its authority. She rejected Chair Cline's assertion that JLCAR ignored the Board's arguments. JLCAR responded to every presentation that was made and repeatedly found that the Board had exceeded its authority. Ms. Honorow also reiterated her concerns that the majority of feedback from districts, educators, and parents opposed the rules. Districts in particular bristled at the prospect of rules

requiring them to accept credits from other entities. She did not believe the Board should sidestep the process by ignoring the feedback of the majority.

Chair Cline retorted that the Board has a legal process for passing rules over JLCAR's objection, a mechanism put in place by the legislature.

Ms. Honorow also wanted everyone to understand that if any lawsuits were to arise over the issue, the State Board would need to be parties to such an action. Attorney Bond responded that she is correct regarding the Board being a party to lawsuits challenging the rules. However, this is not a function of adopting over JLCAR's objection; it would be the case in any event. The impact of adopting over JLCAR's objection is the loss of the presumption that the rules were consistent with the statute. Further, the Board would be defended in such a suit by the Attorney General's office.

Ms. Chagnon worried that the Board may be presumed to have used COVID-19 to sneak the rules through. She also wondered whether the legislature's 90-day extension applied not solely to Learn Everywhere, but to all bills on the table at the time. Chair Cline believed that the extension was in fact specific to Learn Everywhere.

Ms. Chagnon also noted that she liked aspects of the rules, including guarantees that the programs will be reachable and as well as oversight of the

programs. Her only objection was the requirement that one-third of the credits be accepted, which she deemed far too high. Chair Cline replied that it is actually 30%, so slightly short of one-third. He also noted that because of the JLCAR objection, the rules could not legally be amended until after being passed; they must go through as-is. Once the rules are in effect, however, anyone could propose amendments.

Sally Griffin noted that the Board had already voted to endorse Learn Everywhere after many hours of public testimony. In her view, nothing has changed regarding the merits of the program. She considers it "an innovative opportunity to make education fit the student in a dynamic and engaging way" and appreciates the degree to which it is student-centered and focused on experiential learning. She also argued that it would provide another means of preventing loss of students, which is a particular danger in the pandemic.

Ann Lane concurred with Ms. Griffin and notes that nothing has changed since the Board's original discussion on the topic except for the pandemic. Ms. Lane argued that the COVID environment is an excellent reason to support Learn Everywhere, especially considering that parents are nimbler than large districts to address the needs of their children.

Kate Cassady had initially voted no. However, a conversation with the previous commissioner reminded her that Board members' main priority is the

children, not politics or other factors, which in turn led her to support Learn Everywhere. She noted that it is just another educational tool and pointed out that teachers do not have to use it if they do not wish to do so.

Ms. Chagnon noted that this fall would presumably be far too soon for programs to be implemented. Chair Cline concurred that none of these programs would be up and running in the immediate future because the rules require programs to be thoroughly developed and vetted by the Department, a process which would likely take several months.

Ms. Chagnon noted that she, like Kate Cassady, supports the students, schools, and parents. However, she disagreed with Ms. Cassady's point that the schools can choose. In fact, they must accept the program, which gives her concern over how this will affect the credit situation at a school. Chair Cline reiterated that, going forward, there will be a process to address this concern.

Phil Nazzaro stated that his support for the program is already on the record. Given the amount of debate that has occurred, he felt that it was time for a motion.

MOTION: Phil Nazzaro made the following motion, seconded by Sally Griffin, that the State Board of Education adopt Ed. 1400, Learn Everywhere Program.

VOTE: The motion was approved 4:2 by roll-call vote, with State Board of Education Members Sally Griffin, Ann Lane, Kate Cassady, and Phil Nazzaro voting in favor. State Board of Education Members Cindy Chagnon and Helen Honorow voted against. The Chair abstained.

Chair Cline thanked the Board for the thought put into this issue and for the productive, content-focused discussion.

H. Initial Proposal - Amend Demonstrated Knowledge and Skills (Ed 306.27(d))

Amanda Phelps provided background on the proposal. Ed 306.27(d) states that students can demonstrate knowledge and skills on a placement pretest developed by the local school district for a particular course. This rule adds that if a placement pretest does not exist, students are allowed to take a test that is approved by the Department. Further, if students prove they have the knowledge and skills, they shall be awarded credit. (Previously, students in this situation were allowed only to move on to a higher course, with no credit awarded for competencies.)

Commissioner Edelblut provided context to illustrate the importance of the rule. Pre-COVID, the Department investigated the extent to which students were permitted to take a placement pretest and receive credit for their mastery of the competencies. It was found that the rule had not, in fact, been implemented, despite having been in place for over a decade. Languages were the only area in which students were being allowed to take a placement pretest, and even then, students were not receiving credit for competencies. (For example, students who tested out of Spanish I would be allowed to enter Spanish II, but they were not given credit for Spanish I.) Commissioner Edelblut then reached out to superintendents to develop pretests. The superintendents estimated it would take three to five years to develop the pretests. The Department wishes to develop state-level tests in order to accelerate the process. The local districts could then choose either to adopt a Department pretest or to develop their own test.

Ms. Chagnon wondered how a state test could deal with the variations of how competencies are achieved between districts. Commissioner Edelblut replied that the competencies developed at the local level are required to be based on the state academic standards. Thus, while there may be some nuanced variation from district to district, there is a broad understanding of the expected standards.

Chair Cline added that the longstanding rule is in line with New Hampshire's competency-based system, which allows students to skip seat time in courses for which they have already achieved competency. Despite the rule having been in

place for so long, many districts did not develop the tests. The proposed amendment would allow the existing rule to finally be put into practice.

Ms. Chagnon asked whether the ability to receive credit was already in legislation, or whether that component is a new addition. Chair Cline noted that for students wishing to attend college, their transcript needs to show credit for courses that they have placed out of. Ms. Chagnon replied that if a student skips Spanish I, Spanish II, III, et cetera would show up on their transcript for college admission purposes. She feels that giving credit for a course that the student did not actually take seems almost dishonest to the colleges.

Commissioner Edelblut addressed Ms. Chagnon's initial question, stating that, according to the original drafter of the rule, the rule's intention was that students should receive credit for demonstrating mastery of competencies. The amendment under discussion is intended to make clear the original intention of the existing rule. Further, giving students credit for competencies affords them more flexibility in their future educational opportunities because they have more capacity to advance.

Chair Cline quoted Rule 306.27(f), which states that "credits shall be based on the demonstration of district and/or graduation competencies, not on time spent achieving the competencies" to emphasize that this is already in the existing rule. The amendment is just compliance with that rule.

Ms. Honorow countered that there is a distinction between a placement test and being awarded competency. Schools regularly conduct placement tests to determine which class to place a student in, but they do not award credits for these tests. Ms. Honorow thus felt that the concept of giving credit is clearly an addition, not a mere clarification. She also expressed concern that this addition is increasing reach into the districts by forcing them to accept these test results as credit. Commissioner Edelblut expressed his hope that the Board would support the initial proposal, noting that there will be plenty of opportunity for further conversation on the subject. He also indicated he would be happy to connect Board members with Fred Bramante, who would be able to provide detail on New Hampshire's competency-based system.

MOTION: Phil Nazzaro made the following motion, seconded by Sally Griffin, that the State Board of Education approve amendment 306.27(d), Demonstrated Knowledge and Skills.

VOTE: The motion was approved 4:2 by roll-call vote, with State Board of Education Members Sally Griffin, Ann Lane, Kate Cassady, and Phil Nazzaro voting in favor. State Board of Education Members Cindy Chagnon and Helen Honorow voted against. The Chair abstained.

AGENDA ITEM VII. COMMISSIONER'S UPDATE

Commissioner Frank Edelblut discussed the work going on to prepare for school reopening. The Department is working closely with all schools to support them through the process. The governor received 100,000 cloth masks from FEMA, and the Department has been working closely with the New Hampshire National Guard to distribute these masks to the school districts. The Department is also working closely with Health and Human Services, along with the governor's office, to provide clear guidance on handling a COVID-19 event in a building.

The Department conducted a survey related to reopening guidance, the results of which were published on the Department webpage several weeks ago. The Department has also used the survey results to create individualized district reports, which are also available on the website. In addition, the Department has made available on its website PDFs of all district reopening plans in order to create a shared resource for district leaders. These plans are in different stages: some are still in development, some are pending approval, and some are approved.

The Department is also working closely with the Virtual Learning Academy Charter School (VLACS), which has seen a significant surge in the number of students applying to the program, either directly or through school districts. The Department is supporting families seeking a fully remote option and is working closely with Steve Kossakoski to accommodate as many students as possible.

iLearnNH is the name of the statewide learning management system. It is Canvas-based, and it is being implemented in the K through 20 space (K-12, community colleges, and the New Hampshire university system). The first cohort of schools in the implementation process will go live on Monday. This will cover about 60,000 students in 50 schools. Implementation will be done in batches. Individuals from Canvas and the University of New Hampshire are working directly with the schools on instructional design and integration.

Elementary and Secondary School Emergency Relief Fund (ESSER) grants are continuing to move forward. These grants comprise about \$34 million that has been made available to the districts to aid in coronavirus response. At this point, approximately 50 grants have been approved. Only 37 grant applications have not yet been submitted, in many cases because those district leaders are still finalizing back-to-school plans and are awaiting more information on how they intend to allocate the funds.

Some schools are opting for remote-only plans. The Department is strongly encouraging and trying to help facilitate for these districts in-person support services, particularly for students with Individual Education Plans (IEPs). The Department is also working with districts to ensure that Career and Technical Education (CTE) students can gain access to their programming. Nashua will be

opening their CTE centers to allow students lab time. Efforts are also being focused on English Language Learners to ensure they do not fall behind.

Finally, the Department has been working with Health and Human Services around issues of attendance, reporting, and mandatory reporting. Data was gathered on what the reporting looked like. There was a falloff in reporting, but it was uneven, with some districts maintaining their normal levels and other districts falling off significantly. Falloff tended to happen in remote and hybrid districts. Teachers fell off somewhat, but not nearly as much as other support staff did. As a result, the Department will be doing specific trainings about creating pathways to help support staff maintain closer contact with students.

Ms. Griffin asked for more detail on iLearnNewHampshire.com. Will districts be adopting the platform, or is it up to individual teachers to participate? Commissioner Edelblut replied that it can happen on both levels. The Department is encouraging all districts to adopt it, with the goal of making schools nimbler in responding to the pandemic environment. The platform would also allow for more consistency across the state. The Department has set up a three-year licensing agreement through the University of New Hampshire, so it will be offered for at least three years at no cost to the districts. Educators are not being required to adopt it.

Ms. Chagnon wondered if districts are aware of the shortage of hand sanitizer and the low-quality sanitizers that have been emerging recently. She also asked whether the state could help school districts acquire the large amount of hand sanitizer that will be needed. Commissioner Edelblut stated that the Department has connected schools to the Department of Administrative Services, in coordination with the Homeland Security office, to allow school districts to place their orders under bulk contracts. The governor has also committed to work with schools that are having shortages to enable them to access state stockpiles of personal protective equipment. The Commissioner had not heard of any such shortages so far.

Commissioner Edelblut also provided examples of the kinds of issues that the Department is helping districts to solve. Fire code prohibits mounting alcohol-based hand sanitizer devices at building entries and exits, which is exactly where sanitizers need to be placed. The Department is thus working with the state fire marshal to solve this problem. Also, many districts have been procuring Chromebook devices, but one of the districts reported difficulty moving their order through the customs process. The Department has been working with their federal delegation to ensure that these orders do not get stalled.

Ms. Griffin is friends with a teacher in Nashua who currently uses a Chromebook and who reported that the device is not an adequate tool for remote teaching. This teacher is on iDonate, which allows her to raise funds to acquire

more suitable technology. Ms. Griffin asked whether Chromebooks are, in fact, inadequate for a teacher to teach from. Commissioner Edelblut explained that the Chromebook is an Internet device and thus relies on apps that reside in the cloud. He noted that Chromebooks are not the most powerful computing platform available and that their adequacy would really depend on what the teacher is teaching and what tools they are accessing. The Commissioner said he would be happy to check in with Nashua to see whether this is a pervasive problem.

AGENDA ITEM VIII. OPEN BOARD DISCUSSIONS

Ms. Honorow asked whether Chair Cline intends to set up a task force to proceed to the next stage of reviewing needs for charters, or whether he plans to discuss this in a retreat. Chair Cline had initially envisioned setting up a task force, but Kate Cassady's suggestion of a retreat seems particularly intriguing. He indicated that he has not made a final decision on the best approach and would like to hear from Board members regarding their preferences.

AGENDA ITEM IX. OLD BUSINESS

There was no old business.

AGENDA ITEM X. TABLED ITEMS

There were no tabled items discussed.

AGENDA ITEM XI. CONSENT AGENDA**A. Meeting Minutes of July 9, 2020**

There being no discussion of the meeting minutes, Chair Cline called for a motion to approve the minutes.

MOTION: Ann Lane made the motion, seconded by Sally Griffin, to approve the Minutes of July 9, 2020 as presented.

VOTE: The motion was approved by roll-call vote by State Board of Education Members Sally Griffin, Ann Lane, Kate Cassady, Helen Honorow, and Drew Cline, with Cindy Chagnon abstaining because she was not present at the meeting. Phil Nazzaro did not vote because he needed to leave the meeting early.

AGENDA ITEM XII. NONPUBLIC SESSION

MOTION: Cindy Chagnon made the following motion, seconded by Sally Griffin, that the State Board of Education move to nonpublic session under RSA 91-A:3, II(c).

VOTE: The motion was approved at 12:24 PM by roll-call vote by State Board of Education Members Sally Griffin, Ann Lane, Kate Cassady, Cindy Chagnon and Helen Honorow with the Chair abstaining.

MOTION: Cindy Chagnon made the following motion, seconded by Sally Griffin, that the State Board of Education to leave nonpublic session and return to public session at 1:00 PM.

VOTE: The motion was approved by roll-call vote by State Board of Education Members Sally Griffin, Ann Lane, Kate Cassady, Cindy Chagnon and Helen Honorow with the Chair abstaining.

MOTION: Ann Lane made the following motion, seconded by Sally Griffin, to seal the minutes of the nonpublic session.

VOTE: The motion was approved by roll-call vote by State Board of Education Members Sally Griffin, Ann Lane, Kate Cassady, Cindy Chagnon, and Helen Honorow with the Chair abstaining.

AGENDA ITEM XI. ADJOURNMENT

MOTION: Cindy Chagnon made the motion, seconded by Sally Griffin, to adjourn the meeting at 1:00 p.m.

VOTE: The motion was approved by roll-call vote by State Board of Education Members Sally Griffin, Ann Lane, Kate Cassady, Cindy Chagnon, and Helen Honorow with the Chair abstaining.

Secretary



School Administrative Unit #41

Hollis, Brookline & Hollis-Brookline Cooperative School Districts

Office of the Superintendent of Schools

4 Lund Lane

Hollis, New Hampshire 03049

603.324.5999 fax 603.465.3933

RECEIVED
MAY 05 2020
STATE DEPARTMENT
OF EDUCATION

Angela Adams, Program Specialist
State Board of Education
101 Pleasant Street
Concord, NH 03301

RE: Certification of New Apportionment Formula

Dear Ms. Adams:

The Hollis-Brookline Cooperative School District held a Special Meeting on January 29, 2020, in accordance with its Articles of Agreement to consider a proposed change to its apportionment formula. After robust debate and discussion, more than 2/3 of the legislative body voted to change to the apportionment formula. Specifically, 469 of the 651 votes (72%) were cast in favor of the change. The Apportionment Formula was last changed on January 12, 2015. The following supporting documents are provided for as evidence of the change to the Articles of Agreement:

- A. Copy of the January 29, 2020 Special Meeting Warrant
- B. Certificate of Posting
- C. Evidence of Publication
- D. Minutes of the District Special Meeting, including voting results
- E. Current Articles of Agreement

A link on the front page of SAU #41's website (sau41.org) titled "COOP Special Meeting: Apportionment Presentation" provides additional information related to the change in the formula.

The Hollis-Brookline Cooperative School District submits this information to the New Hampshire State Board of Education in accordance with its Articles of Agreement and RSA 195:18, **III(i)**, seeking certification of the change to its Apportionment Formula effective July 1, 2020

Please let me know if you require any additional materials.

Sincerely,

Andrew Corey, Superintendent
SAU #41

NOTICE TO THE CITIZENS OF HOLLIS and BROOKLINE, NH
SPECIAL DISTRICT MEETING
for the
Hollis Brookline Cooperative School District

To the inhabitants of the Hollis Brookline Cooperative School District in the Towns of Hollis and Brookline in the County of Hillsborough, State of New Hampshire qualified to vote in District Affairs.

You are hereby notified to meet at **6:30 PM** in the **Hollis Brookline High School Gym** in said district on the **twenty-ninth day of January 2020** (1/29/20) to act on the following subject (snow date is thirtieth day of January 2020 (1/30/20).

ARTICLE 1: To see if the school district will vote to amend the Articles of Agreement of the Hollis Brookline Cooperative School District as follows:

Article 5:

The operating expenses, excluding principal and interest payments on bonds, of the Hollis Brookline Cooperative School District, payable in each fiscal year, shall be apportioned based on Average Daily Membership (ADM) and Equalized Valuation (EV) according to the table below:

<u>ADM Weight</u>	<u>EV Weight</u>
95%	5%

The expenses related to principal and interest of bonds (current and future), of the Hollis Brookline Cooperative School District, payable in each fiscal year, shall be apportioned based on Average Daily Membership (ADM) and Equalized Valuation (EV) according to the table below:

<u>ADM Weight</u>	<u>EV Weight</u>
0%	100%

Amendment Adds:

After the calculations are made as set forth above. an additional amount of \$1 will be assessed to Hollis prior to apportionment.



School Administrative Unit #41

Hollis, Brookline & Hollis-Brookline Cooperative School Districts

Office of the Superintendent of Schools

4 Lund Lane

Hollis, New Hampshire 03049

603.324.5999 fax 603.465.3933

Certificate of Posting

I certify that on January 12, 2020, a copy of the Hollis Brookline Cooperative School District Meeting Warrant was published in the Telegraph newspaper, and on January 7, 2020, I posted copies of the warrant at the place of the meeting, Hollis Brookline Middle School, Hollis Primary School, Hollis Upper Elementary School, Richard Maghakian Memorial School, Captain Samuel Douglass Academy, SAU #41 Office, and on the SAU #41 website.

Date: 1/12/20 Jw

Kelly Seeley,
SAU #41 Business Administrator

SPECIAL DISTRICT MEETING MINUTES
Hollis Brookline Cooperative School District
Hollis Brookline High School, Hollis, NH

29 January 2020

Hollis Brookline Coop School Board

Holly Deurloo Babcock, Chair
Tom Solon, Vice Chair
Cindy Van Coughnett
Beth Williams, Secretary
Elizabeth Brown
Melanie Levesque
Krista Whalen

Drew Mason, Moderator
James O'Shaughnessy, District Counsel
Diane Leavitt, District Clerk

Hollis Brookline Coop Budget Committee

Darlene Mann, Chair
Raul Blanche
Brian Rater
David Blinn
Tom Enright
Lorin Rydstrom
James Solinas
Cindy Van Coughnett-School Board Representative

SAU #41 Administration

Andrew Corey, Superintendent
Gina Bergskaug, Assistant Superintendent
Kelly Seeley, Business Administrator

Hollis Brookline High School

Richard Barnes, Principal
Robert Ouellette, Assistant Principal
Amanda Zeller, Assistant Principal
Lauren DiGennaro, Assistant Principal

Hollis Brookline Middle School

Timothy Girzone, Principal
Yolanda Flamino, Assistant Principal
Jennifer Campbell, Assistant Principal

The meeting was called to order at 6:30pm by the Moderator, Drew Mason at the Hollis Brookline Cooperative High School gymnasium. The meeting was started with the Pledge of Allegiance. National Anthem was sung by the members of the Hollis Brookline Honors choir. Moderator recognized all veterans and serving members of our armed forces.

Holly Deurloo Babcock, School Board chair introduced the School Board. SAU 41 Superintendent, Andy Corey introduced the SAU and the school staff. Moderator introduced School District Council, James O'Shaughnessy and School District Clerk, Diane Leavitt. Moderator recognized the Ballot Clerks, Supervisors of the Checklist, assistants and volunteer counters on the floor.

Moderator went over calendar of meetings and upcoming elections. Moderator went over the rules of the meeting, overview of the warrant and time schedule. Moderator Mason motioned to adopt the rules of the meeting. Seconded by Holly Deurloo Babcock. No discussions. Moderator brought adopting rules of the meeting to a vote. CARRIED by a card vote.

ARTICLE 1: To see if the school district will vote to amend the Articles of Agreement of the Hollis Brookline Cooperative School District as follows:

Article 5:

The operating expenses, excluding principal and interest payments on bonds, of the Hollis Brookline Cooperative School District, payable in each fiscal year, shall be apportioned based on Average Daily Membership (ADM) and Equalized Valuation (EV) according to the table below:

<u>ADM Weight</u>	<u>EV Weight</u>
95%	5%

The expenses related to principal and interest of bonds (current and future), of the Hollis Brookline Cooperative School District, payable in each fiscal year, shall be apportioned based on Average Daily Membership (ADM) and Equalized Valuation (EV) according to the table below:

<u>ADM Weight</u>	<u>EV Weight</u>
00%	100%

Amendment Adds: After the calculations are made as set forth above, an additional amount of \$1 will be assessed to Hollis prior to apportionment.

Holly Deurloo Babcock motioned to bring Article 1 to the floor. Seconded by Krista Whalen. Tom Solon, School Board gave a presentation. Holly Deurloo Babcock, School Board gave a presentation.

Tom Gehan motioned to amend Article 1. Seconded by Mike Harris. Tom Gehan gave a presentation.

ARTICLE 1: To see if the school district will vote to amend the Articles of Agreement of the Hollis Brookline Cooperative School District as follows:

Article 5:

The operating expenses of the Hollis Brookline Cooperative School District, payable in each fiscal year, shall be apportioned based on one-hundredth (100%) on Average Daily Membership (ADM).

Discussions ensued. Joanne Logger motioned to end debate. Seconded by David Sacks. Moderator brought motion to a vote. CARRIED by 2/3 card vote. Moderator brought motion to amend Article 1 to a vote. NOT CARRIED by a card vote.

ARTICLES OF AGREEMENT BETWEEN
THE DISTRICTS OF HOLLIS AND BROOKLINE *

Article 1:

The school districts of Brookline and Hollis shall combine to form a cooperative junior and senior high school district which shall be named the Hollis/Brookline Cooperative School District, pursuant to RSA 195.

Article 2:

The School Board of the Hollis/Brookline Cooperative School District shall consist of seven members. Effective with the election of 2003, the Board will be organized in the following manner:

<u>Town</u>	<u>Members</u>	<u>Term</u>	<u>Year Ending</u>
Brookline	1 member	3 years	2004
	1 member	3 years	2005
	1 member	3 years	2006
Hollis	2 members	3 years	2004
	1 member	3 years	2005
	1 member	3 years	2006

Members of the Cooperative School Board shall be elected by the voters of the pre-existing districts they represent and must be residents of those pre-existing districts. All members elected shall be elected to three year terms unless that member is filling out the unexpired term of a member who has left the board, in which case the term shall be the unexpired term.

Reapportionment of the school board may be proposed at any time in accordance with RSA's 195:22 and 671:9, but in any case the apportionment as specified above would be subject to review for possible amendment at lease in March, 2005 and every three (3) years thereafter under the provisions of Article 11 of this agreement and RSA 195:18, III(i).

Article 3:

The Hollis/Brookline Cooperative School District shall be responsible for grades seven (7) through twelve (12)

Article 4:

The Hollis/Brookline Cooperative School District shall lease the Hollis High School "White Building" and the Hollis Junior High School from the Hollis School District upon such terms and conditions as the Cooperative School Board negotiates and determines to be in the best interests of the Cooperative School District. The Hollis/Brookline Cooperative School District shall acquire, at no further cost, the existing land, building and contents comprising that portion of the Hollis AREA High School initially constructed in 1962, including subsequent additions.

Article 5:

The operating expenses, excluding principal and interest payments on bonds, of the Hollis-Brookline Cooperative School District, payable in each fiscal year, shall be apportioned based on Average Daily Membership (ADM) and Equalized Valuation (EV) according to the table below:

ADM Weight

95%

EV Weight

5%

The expenses related to principal and interest of bonds (current and future), of the Hollis-Brookline Cooperative School District, payable in each fiscal year, shall be apportioned based on Average Daily Membership (ADM) and Equalized Valuation (EV) according to the table below:

ADM Weight

0%

EV Weight

100%

Article 6:

The State Aid to which each pre-existing district would be entitled if it were not part of the Cooperative School District, grades seven through twelve (7-12), shall be credited to such district's share of the total operating budget.

In the event of a construction project, the State Building Aid which may be available to the Hollis/Brookline Cooperative School District shall be applied to reduce the capital expenditure prior to the apportionment of costs under the provisions of Article 5.

Article 7:

There shall be an advisory finance committee consisting of four (4) members, two (2) members from each pre-existing district, said members to be appointed by the Hollis/Brookline Cooperative School District moderator after consultation with the school moderators of each of the pre-existing districts.

The duties of this committee shall be to review proposed budgets and warrant articles with financial impact and report on same to the cooperative school district. If, at any future date, the cooperative school district votes to adopt the provisions of the Municipal Budget Act, this committee will be dissolved.

Article 8:

All trust funds held or enjoyed by any pre-existing district shall be held and applied as the terms of the trust indicate, in accordance with RSA 195: 11.

Article 9:

A schedule of monthly payments based on the respective shares of the towns of Brookline and Hollis for capital and operating expenses shall be established and revised as necessary by the Hollis/Brookline Cooperative School District and the appropriate town officials from Brookline and Hollis.

Article 10:

The Hollis/Brookline Cooperative School District shall provide transportation for students under terms decided by the Hollis/Brookline Cooperative Board.

Article 11:

These articles of agreement may be amended by the Hollis/Brookline Cooperative School District, consistent with the provisions of RSA 195: 18, III(i), except that no amendment shall be effective unless the question of adopting such amendment is submitted at a Cooperative School District meeting to the voters of the District after reasonable opportunity for debate in open meeting, and unless a majority of the voters of the District who are present and voting shall vote in favor of adopting such amendment. Furthermore, no amendment to these articles shall be considered except at an annual or a special meeting of the Cooperative School District and unless the text of such amendment is including in an appropriate article in the Warrant for such a meeting.

It shall be the duty of the Cooperative School Board to hold a public hearing concerning the adoption of any amendment to these articles of agreement at least ten (10) days before such annual or special meeting and to cause notice of such hearing and the text of the proposed amendment to be published in a newspaper or newspapers having general circulation in the District at least fourteen (14) days before such hearing.

Article 12:

The date of operating responsibility of the Hollis/Brookline Cooperative School District shall be July 1, 1991.

Article 13:

It will be the responsibility of the Cooperative School Board to plan a minimum of two joint meetings per year with the Hollis and Brookline School Boards for the purpose of discussing issues of mutual interest.

Article 14:

For the 1991-92 school year exclusively, the Hollis/Brookline Cooperative School District will offer employment to all teachers under contract in grades 7-12 in the Hollis School District on April 1, 1991, who have not been non-renewed in the ordinary course of business, except that the Cooperative School District will not employ more teachers than the number of teaching positions established in the Cooperative School District.

** Approved by the AREA School Plan Review Board on 12/14/89.
Approved by the Voters of Hollis and Brookline at a Special School District Meeting on February 2, 1990.
Approved by the State Board of Education on January 10, 1990.
Amendment approved at the March 1996 Annual District Meeting (Article 5)
Amended by the State Board of Education March 11, 1996.
Amendment approved at the March 6-7, 2002 Annual District Meeting (Article 2 and Article 5).
Amended by the State Board of Education April 17, 2002.
Amendment approved at the January 12, 2015 Special School District Meeting (Article 5).
Amended by the State Board of Education February 18, 2015.*