STATE PUBLIC CHARTER SCHOOL AUTHORITY



2022 CALL FOR QUALITY CHARTER SCHOOLS Updated October 4, 2021

Schools Opening Fall 2023 and Beyond

MS Word Application Template

Previous versions of this application had been divided into four tracks. However, this version incorporates all four tracks into one standard application along with an addendum that must be completed by certain applicants. Please see the addendum to determine if you are required to answer those additional questions. Should you have questions about the application, you can contact Mark Modrcin (<u>mmodrcin@spcsa.nv.gov</u>).

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(1) <u>SPCSA Charter Proposal Cover Sheet</u>

Identify the **primary point of contact** for your Committee to Form. If you are a Charter Management Organization applying directly for sponsorship, please also identify the **primary point of contact for your organization**.

Barring a change in the makeup of the founding group, this will likely be the liaison identified in the Notice of Intent. This individual will serve as the contact for all communications, scheduling, and notices regarding your application. The Primary Contact is expected to ensure that your founding group receives all general communications promptly. Please note that, as with all aspects of your application, names and contact information of the Primary Contact will become public information.

Primary contact person:	Jonathan Johnson				
Mailing address:					
Street/PO Box:					
City: New Orleans		State	LA	Zip	70122
Phone Number: <i>day</i>		evening			
Fax Number: N/	A Emai	l:			
Name of team or entity appl	ying: Rooted School Fou	indation			

In accordance with NRS 388A.249, a Committee to Form or a Charter Management Organization may submit an application to the State Public Charter School Authority. For Committee to Form applicants please refer to the membership requirements below and note that neither the Primary Contact nor any other member of the Committee to Form may be an employee of a proposed vendor, including an educational management organization.

NRS 388A.240 Membership of committee to form charter school.

1. A committee to form a charter school must consist of:

(a) One member who is a teacher or other person licensed pursuant to <u>chapter 391</u> of NRS or who previously held such a license and is retired, as long as his or her license was held in good standing;
 (b) One member who:

(1) Satisfies the qualifications of paragraph (a); or

(2) Is a school administrator with a license issued by another state or who previously held such a license and is retired, as long as his or her license was held in good standing;

(c) One parent or legal guardian who is not a teacher or employee of the proposed charter school; and

(d) Two members who possess knowledge and expertise in one or more of the following areas:

(1) Accounting;

(2) Financial services;

(3) Law; or

(4) Human resources.

2. In addition to the members who serve pursuant to subsection 1, the committee to form a charter school may include, without limitation, not more than four additional members as follows:

(a) Members of the general public;

(b) Representatives of nonprofit organizations and businesses; or

(c) Representatives of a college or university within the Nevada System of Higher Education.

3. A majority of the persons who serve on the committee to form a charter school must be residents of this State at the time that the application to form the charter school is submitted to the Department.

4. As used in subsection 1, "teacher" means a person who:

(a) Holds a current license to teach issued pursuant to <u>chapter 391</u> of NRS or who previously held such a license and is retired, as long as his or her license was held in good standing; and

(b) Has at least 2 years of experience as an employed teacher.

 \rightarrow The term does not include a person who is employed as a substitute teacher.

NRS 338.249 permits a committee to form or a charter management organization to submit a charter school application.

Is the applicant a Committee to Form or a charter management organization (CMO)? Committee to Form Charter Management Organization x

If the applicant is a CMO, identify the CMO and any affiliated NV non-profit:	Rooted School Foundation (CMO)
	Rooted School–Clark County (NV Non-Profit)

<u>Committee to Form Applicants</u>: Please list the names, residence, and roles of all persons on the committee to form. Each member should be listed in the space that aligns to their membership category pursuant to NRS 388A.240. Note that the Committee to Form may be different than the proposed Governing Board.

NRS 388A.240 Membership Category	Full Name	State and County of Residence (list permanent residence)	Position with Proposed School
1(a): a teacher or other			
person licensed pursuant to			
chapter 391 of NRS			
1(b): a teacher or other			
person licensed pursuant to			
chapter 391 of NRS OR a			
school administrator			
1(c): a parent or legal			
guardian who is not a			
teacher or employee of the			
proposed school			
1(d): a person with			
knowledge and expertise in:			
(1) Accounting;			
(2) Financial services;			
(3) Law; or			
(4) Human resources.			
1(d): a person with			
knowledge and expertise in:			
(1) Accounting;			
(2) Financial services;			
(3) Law; or			
(4) Human resources.			
2: Other (optional)			
2: Other <i>(optional)</i>			
2: Other (optional)			
2: Other <i>(optional)</i>			

CMO applicants: Please list members of the applicant team including CMO employees, proposed school employees, board members, etc.

Full Name	Role with Proposed School	Organization (Enter CMO or School)
Frank Ingargiola	Advisor to Board and School Leader	Rooted School Foundation
Jonathan Johnson	Advisor to Board and School Leader	Rooted School Foundation
Kaitlin Karpinski	Advisor to Board and School Leader	Rooted School Foundation

Does this Committee to Form, charter management organization, or education management organization have charter school applications under consideration by any other

authorizer(s) in the United States? Yes X

If yes, complete the table below, adding lines as needed.

s	tate	Authorizer	Proposed School Name	Application Due Date	Decision Date

Does this Committee to Form, charter management organization, or education management organization have new schools scheduled to open elsewhere in the United States in the 2022-23 or 2023-24 school years? Yes No

If yes, complete the table below, adding lines as needed.

Proposed School Name	City	State	Opening Date
Rooted School–Washington	Vancouver	WA	August 2023

Proposed School Name (add lines as needed):

Proposed School Name(s)*		Grades served Year 1	Grades served at capacity
Rooted School–Washington	2023	9th	9 th – 12 th

Planned Enrollment (Must Correspond to Budget Worksheet Assumptions)

	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29
К						
1						

2						
3						
4						
5						
6						
7						
8						
9	90	90	90	90	90	90
10	90	90	90	90	90	90
11	0	90	90	90	90	90
12	0	0	90	90	90	90
Total	180	270	360	360	360	360

Proposed Location

If an exact location has not been determined, please provide a detailed description of the proposed contact location including, geographic area, cross streets, and neighborhood.

Campus Location	County	Zip Code(s) to be Served by School
TBD	Clark County	89115, 89110, 89156

Nevada law currently permits an operator to contract with a for-profit, Education Management Organization or a non-profit, Charter Management Organization.

	ool intend to contract or partner with an education management charter management organization (CMO) to provide school management No
If yes, identify the name of the EMO or CMO and specify which designation:	Rooted School Foundation

In accordance with NAC 388A.160(8), if this application was prepared by a person who is not a member of the committee to form the charter school, or by another entity, including, without limitation, an educational management organization, or if such a person or entity assisted the committee in preparing the application, the applicant must disclose information about that person and/or entity.

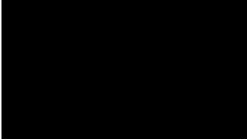
Was the application prepared by a person who is not a member of the Committee to Form the charter school or CMO, or by another entity including, without limitation, an educational management organization? Additionally, did a person who is not a member of the Committee to Form the charter school, CMO, or another entity including, without limitation, an educational management organization assist the committee in preparing the application?

Yes	Х	No
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If yes, what is the name of the person(s) and/or entity(s)?	
Please list any affiliations this	
person(s) and/or entity(s) has to	

existing schools and the dates of such affiliation.	
Please provide a resume for the person(s) and or entity(s) as Attachment 27	

Applicant Certification:



Signature

April 24, 2022

Date

Jonathan Johnson
Printed Name:

Note: In addition to the complete, unredacted version of the application, <u>NAC 388A.265</u> requires that applicants submit a version of the application which excludes or redacts from the application and any related material to be shared with the public. All applicants should be prepared to submit a version of their application that complies with this regulation, if requested.

(2) <u>Meeting the Need</u>

MISSION AND VISION

The mission of your school should describe the purpose of your school, including the students and community to be served and the values to which you will adhere while achieving that purpose. The vision of your school should describe what success looks like for students, for the school as a whole, and for any other entities that are critical to your mission. The mission and vision statement should align with the purposes of the Nevada charter school law and the mission of the State Public Charter School Authority and serves as the foundation for the entire proposal.

- (1) Provide the mission and vision for the proposed school and briefly describe how they serve as the foundation for the proposed school, including:
 - (a) The key components of your educational model
 - (b) The outcomes you expect to achieve
 - (c) Key supporters, partners, or resources that will contribute to your school's success
- (2) A charter school must have as its stated purpose at least one of the goals set forth in NRS 388A.246. Please identify the statutory purpose(s) of the school and how these align to the mission and vision of the school. The six statutory purposes are:
 - (a) Improving the academic achievement of pupils;
 - (b) Encouraging the use of effective and innovative methods of teaching;
 - (c) Providing an accurate measurement of the educational achievement of pupils;
 - (d) Establishing accountability and transparency of public schools;
 - (e) Providing a method for public schools to measure achievement based upon the performance of the schools; and
 - (f) Creating new professional opportunities for teachers.

(1) Mission and Vision:

At the current rate of change, it will take 228 years for the average African American family to obtain the same amount of wealth as the average white family in the U.S., and 84 years for the average Latino American family. If no action is taken to address the racial wealth gap, communities of color are on a pathway to hit zero wealth in the coming decades, perpetuating and exacerbating the significant existing inequities that exist across the United States.

The story is the same in Clark County, Nevada and these income and wealth disparities continue to set Economically Disadvantaged Students¹ behind. According to analysis conducted by Opportunity Atlas, a Harvard project that studies the correlation between neighborhoods, demographics, and income, African American and Latino people in Clark County, NV will earn only 70% of the average White person's annual salary by age 35 (\$31,000 vs. \$44,000 annually).² Clark County, where Rooted School–Clark County (RS-CC) will be located, ranks fifth in poverty in the state of Nevada

¹ Nevada State Public Charter School Authority. 2022 Academic and Demographic Needs Assessment. January 28, 2022, (Version 1.3). P. 8.

<<u>https://charterschools.nv.gov/uploadedFiles/CharterSchoolsnvgov/content/Families/2022%20Academic</u> %20and%20Demographic%20Needs%20Assessment FINAL To%20Post.pdf>

² <u>https://www.opportunityatlas.org/</u>

and the zip codes to be served by RS-CC (89115, 89110, 89156) have three 2-star high schools (Desert Pines High School, Global Community High School, and Eldorado High School), one 3-star high school (Sunrise Mountain High School), and one 4-star high school (Equipo High School) based on the most recent data available.³ These are the only open-enrollment high school options in some of the highest need zip codes across Clark County according to Opportunity 180's Priority Footprint Map.⁴

Meanwhile, Nevada is experiencing one of the most significant economic recoveries from the pandemic of any state in the United States. A report released in December 2021 by the Federal Funds Information for States ranked Nevada first in the nation in terms of "economic momentum." a metric based on year-over-year growth in personal income, employment, and population. The economic momentum framework highlights how Nevada has rebounded at a rapid pace from a twomonth long recession at the start of COVID-19 pandemic that saw unemployment climb to its highest level in state history.⁵ But the recovery, and the state's economic momentum, are not evenly distributed. Clark County had the highest unemployment rate of any other Nevada county in February 2022 at 5.3 percent compared to the national unemployment rate of 3.8 percent.⁶ Furthermore, Nevada is still down 50,000 jobs since a February 2020 peak with losses primarily in the accommodation industry-a sector that includes casinos and hotels-which is still down more than 67,000 jobs. With thousands of workers shifting to new industries, Nevada's labor market has seen some of the highest rates of hires and job separations in the country.⁷ CBRE, the world's largest commercial real estate and services company rated Las Vegas within its 'Next 25' up-andcoming tech markets over the next 5 years as it makes a post-pandemic recovery. Available to young adults now are family-sustaining jobs in IT, healthcare, and trade & transportation, that don't require 4-year college degrees, and could lift thousands of families RS-CC intends to serve out of poverty now. This is the opportunity RS-CC intends to create for the most Economically Disadvantaged Students in Clark County.

The mission of Rooted School Foundation is to rapidly reduce America's wealth gap by connecting underserved and talented teenagers with career and financial pathways. From its origins as a 15-student pilot in a local high school in 2015, the Rooted School Foundation's network of schools in New Orleans, Indianapolis, and Vancouver, Washington is now regarded as one of the most innovative public charter high school models in the U.S according to the Canopy Project.⁸ For a student body that is more than 90% FRL and non-White, RS-CC aims to build the professional skills of underserved students and connect them with career and academic opportunities through place-based programs and partnerships with local companies. RS-CC will help ensure that students are academically successful and on a pathway to high-wage careers through individualized college and career support and an Industry Advisory Council (IAC). The school will provide individualized support to students through a Director of College and Career Transition, whose sole purpose is to

³ Opportunity 180 School Performance Data Portal. <u>https://opportunity180.org/school-map.html</u>.

⁴ Opportunity 180 Priority Footprint Map. <u>https://opportunity180.org/data-research/</u>.

⁵ Riley Snyder and Michelle Rindels. Nevada posts 28.2 percent unemployment rate, higest in the nation. The Nevada Independent. May 22, 2020. <<u>https://thenevadaindependent.com/article/nevada-posts-28-2-percent-unemployment-rate-highest-in-nation</u>>

⁶ Hudson, Sabrina. Clark County has highest unemployment rate in state. Las Vegas Review–Journal. March 29, 2022. < <u>https://www.reviewjournal.com/local/local-nevada/clark-county-has-highest-unemployment-rate-in-state-2553139/</u>>

⁷ Golonka, Sean. Road to Recovery: Nevada leads in 'economic momentum' amid rapid labor turnover. January 10, 2022. <u>https://thenevadaindependent.com/article/road-to-recovery-nevada-leads-in-economic-momentum-amid-rapid-labor-turnover</u>

⁸ The Canopy Project. https://canopyschools.transcendeducation.org/

make sure that students graduate with job and college opportunities in hand. A key part of this work is the development of an individual graduation plan for each student that is personalized to their unique interests and leads to a four-year college degree, a high-wage career, and upward economic mobility.

RS-CC will align its educational experiences with regional workforce needs by coordinating an IAC, whose members advise the school on career-aligned curricula, offer work-based learning experiences through paid and unpaid internships, and ultimately hire students into family-sustaining jobs and industries in Clark County and Nevada at-large. This has been a successful model in other regions and created strong partnerships that contribute to a closer bridge between K-12 and family-sustaining jobs and careers.

Launching in 2023, RS-CC will begin with two grades and grow one grade at a time to ensure that every student gets the attention they need and the school can build and grow high-quality programming. At scale, the school will serve 360 students annually from its targeted zip codes until all grades are filled by SY 2025-2026. RS-CC's goal is to place 80-90% of these youth into jobs that pay above the average household income in their region by age 22. Along the way, Rooted students will outperform their peers at schools in the surrounding district on standardized tests and in graduation rates, securing college degrees and/or strong first jobs, and maintaining low debt-to-income ratios once they graduate and begin work. In addition, at least 70% of Rooted employer partners will report a net positive return on investment for hiring Rooted graduates.

(a) The key components of your educational model

RS-CC will reduce the income and wealth gap for students it serves through the use of an innovative school model that embodies

- Self-Directed Learning: At RS-CC, students will be provided with personalized learning plans and pathways that help them connect education with personal passions and hands-on projects and allow students to move at their maximum ability and pace through all core content from 9th-12th grade.
- Industry-Based Credentials (IBCs) and Internships: Students complete coursework on industry-partner informed playlists during two learning blocks during the day to earn credentials. Students are expected to earn at least four by the time they graduate. Examples of credentials are CompTIA, Autodesk Inventor, Adobe Creative Cloud Suite, and Salesforce Administrator. Credentials are also a core pathway for students to qualify for Rooted's Green Balloon Fellowship, a program that places graduating seniors into high-growth, high-wage careers—right out of high school.
- Project Based Learning: Students will apply Deeper Learning to solve real-world challenges while reinforcing other learning elements. Students work on projects that are designed with technology industry partners in mind, for example, New Orleans Rooted students used computer 3D modeling programs to create models that addressed the question: "How might New Orleans build monuments that better represent what our city stands for?"

(b) The outcomes you expect to achieve

Long-Term Goals: We will know that we are successful in six years if the following are true:

• RS-CC is consistently rated a 4-star high school;

- Annually, at least 25% of our graduates are accepted into the Green Balloon Fellowship (described later in the application)
- Annually, 100% of the students who aspire to attend 4-year college are accepted
- Annually, at least 90% of our students are on track to graduate high school in four years
- Annually, 70%-80% of students earn at least (1) IBC offered that year
- On average, our students outperform district averages for ELA and Math
- We retain the top 90% of our teachers year-over-year who consistently uphold our values and standards of performance
- RS-CC achieves non-reliance on philanthropy for financial sustainability by Year 4 or Year 5
- 80%-90% of our graduates earn living-wage jobs by age 22 as defined by MIT's Living Wage Calculator. If we achieve this, Rooted will be one of the fastest paths to upward economic mobility in Southern Nevada.

(c) Key supporters, partners, or resources that will contribute to our school's success

Key supporters, partners, or resources that will contribute to Rooted Clark County's success include but is not limited to:

- Rooted School Foundation (RSF): The staff and Board of Directors will be key collaborators and partners in fulfilling RS-CC's mission and vision and setting strategic priorities over time.
- Rooted School–New Orleans, Rooted School–Indianapolis, Rooted School–Vancouver: The school-level teams and Board Chairs will be key collaborators and partners in fulfilling RS-CC's mission and vision.
- Opportunity 180 (0180): 0180 is a seed funder and advisor to RS-CC during its startup phase.
- Charter School Growth Fund (CSGF): CSGF is a current advisor and funder of RSF and its growth plans. If approved, CSGF will likely provide expansion funding to support RS-CC on the path towards sustainability on per pupil revenue if there is demonstrated progress towards a successful launch.
- Nevada Prep Charter School: Nevada Prep is a 4-star middle school in Las Vegas and a primary feeder school into RS-CC.
- Charter Schools Development Corporation (CSDC): Facility planning and support.
- Education Board Partners: Ongoing support for local board governance.
- EdOps: Back-Office finance specialists.
- Hugh Anderson (Trustee, Las Vegas Metro Chamber of Commerce; Governor's Workforce Development Board): Mr. Anderson is a local economic development leader and initiated RS-CC's relationships with prospective IAC employers.
- Irene Bustamante (Deputy Director and Chief Strategy Officer, Workforce Connections): Ms. Bustamante is a former legislator and local workforce development leader and has invited RS-CC to join the employer task force in healthcare.

(2) **Statutory Purpose(s)**

(a) Improving the academic achievement of pupils

Rooted's educational model is anchored in a "Four-Year Promise"– all students have an opportunity at a job offer in one hand and a college acceptance letter in the other by graduation. Using best practices from school models both locally and nationally, we intend

to outperform neighboring schools by the end of our fourth year. From UnboundEd Explore to Solid Professor, we intend to partner with organizations and curriculum providers that have a proven track-record educating similar demographics as our students in the 89115, 89110, and 89156 zip codes of our proposed school.

(b) Encouraging the use of effective and innovative methods of teaching

Years of partnership with education researchers and innovative school funders at NewSchools Venture Fund, Charter School Growth Fund, New Schools for New Orleans, The Mind Trust, Opportunity 180, and Washington State Charter School Association have given us explore to innovative teaching methods and best-in-class approaches. Moreover, Rooted is an industry innovator and leader in implementing Industry-Based Credentials (IBC)I and Internships. For example, Rooted School–New Orleans features 10+ STEM IBCs annually at scale and is the only high school in the region with that diversity of options. We intend to leverage our insights from New Orleans and our other regions to offer a similarly diverse offering of IBCs that no high school in our desired zip codes offers. We will also consult our Industry Advisory Council and the Nevada Department of Education's CTE department for guidance, annually, to ensure our students are trained in the skills needed for the 21st century workplace.

(c) Providing an accurate measurement of the educational achievement of pupils

Both Achieve3000 and IXL Math (aligned to NWEA Map) are proven in the areas of measuring achievement and growth for pupils. We will not only use both assessment measurements but will ensure a strong culture of data analysis (called data dives internally) and student growth lead to educational achievement that exceeds district averages.

(d) Establishing accountability and transparency of public schools

Our experiences partnering with New Orleans Public Schools (our first school's charter was renewed for a 5-year term) and the Indianapolis Office of Education Innovation (our second school was approved to open a middle school after running a high school for two years) coupled with our partnership with Education Board Partners has ensured Rooted School–Clark County will have a strong governance model with accountability and transparency as cornerstones of our fiduciary commitment to the citizens of Southern Nevada. These underpinnings and previous experience will give RS-CC a running-start on governance.

e) Providing a method for public schools to measure achievement based upon the performance of the schools.

As mentioned, RS-CC will use interim assessments through Achieve3000 and IXL as ways to measure achievement. Additionally, RS-CC will check annually for progress on such assessments in comparisons to other nearby high schools to ensure we are providing a quality option for students and families.

(f) Creating new professional opportunities for teachers

From Rooted's "People First Paid Time Off" to Deliberately Developmental Organizational (DDO) culture and career advancement opportunities locally and through Rooted School Foundation's national work, we are intent about creating environment that is high-performing and where teachers will feel inspired by a compelling vision for the future. Annual site visits to other top performing and innovative schools and an annual retreat centered around text-based team development will also be implemented.

TARGETED PLAN

(1) Explain how the educational model you wish to implement meets the needs of the community you wish to serve.

(2) During the 2019 legislative session, AB 462 required the SPCSA to develop an Academic and Demographic Needs Assessment. <u>A copy of this document can be found here</u>. Given the demographic and academic needs as defined below, please describe how your proposed school would meet one or more of the needs defined in the Academic and Demographic Needs Assessment.

- (a) Demographics: Applicants meeting this need will propose a school model that includes demonstrated capacity, credible plans, and thorough research and analysis in order to intentionally serve the following student groups, each of which has been identified as persistently underperforming based on data provided by the NDE: Students qualifying for free or reduced-price lunch (FRL), English Language Learners (ELLs), and Students with Disabilities (those with an Individual Education Program, or IEP). Successful applicants will demonstrate the capacity to support these student groups in achieving academic performance at or above the state average.
- (b) Academic Needs: Applicants meeting this need will propose a school model that includes demonstrated capacity, credible plans, and thorough research and analysis to intentionally provide access to 3-, 4- and 5-star schools in zip codes where a significant percentage of students are attending a 1- or 2-star school. A map and list of zip codes is provided within this document; SPCSA charter schools are removed from the data set used to identify zip codes.
- (c) Academic Need: Applicants meeting this need will propose a public charter school model that includes demonstrated capacity, credible plans, and thorough research and analysis to prevent at-risk students from dropping out of school. Models may include but are not limited to programs designed for student groups that are most at-risk of dropping out or programs aimed at enabling credit-deficient students to get back on track to graduate. Applicants should demonstrate a strong understanding of grade-level appropriate indicators for successful high school completion, such as early literacy, attendance, and credit sufficiency and plans to enable students to successfully meet these milestones.

Note that the SPCSA will evaluate charter applications based upon both the public charter school application rubric and the proposed school's plans to meet statewide academic and demographic needs found within the Needs Assessment.

(1) While much research has been produced about the impact of an educational model grounded in career and technical education and culturally relevant education for Economically Disadvantaged Students, Rooted School–Clark County seeks to meet the needs of our community in three specific ways. The following three ways are in direct response to prospective student and feeder school input and research conducted by the Rooted School Foundation team.

(a) Create More High-Quality High School Seats

According to Opportunity 180's Priority Footprint map and 2020 Census data, the 89115, 89110, 89156 zip codes have a significant need for more high-quality seats. Population growth within just 1-mile of one feeder school, Nevada Prep Charter School, is rapidly growing with an increase of 12% since 2000 and 5.4% of expected population growth between 2020 and 2025. This boom in population will only further accelerate the over-crowded neighborhood school classrooms, creating a desperate need for seats.

(b) Create a Bridge to Family-Sustaining Jobs and Careers

By age 35, Black households earn an average of \$25,000/year and Latino households earn \$36,000 compared to White households' \$44,000. Rooted School–Clark County seeks to reduce this gap by providing earlier access to high-growth/high-wage jobs in industries that include but is not limited to: General & Advanced Manufacturing, Creative Industries, Information & Communication Technologies, Transportation & Logistics Technologies, Business & Financial Services, Healthcare Services, and Clean Technologies. These industry clusters are projected to experience the greatest aspirational growth in Southern Nevada according to the Las Vegas Global Economic Alliance.⁹ Examples of jobs include but are not limited to, Computer User Support Specialists, Transportation/Storage/and Distribution Managers, and Computer Network Support Specialists.

(c) Increase Career and Technical Education Opportunities

Nationally, high school Career and Technical Education (CTE) has received an increase in attention from both policy makers and researchers in recent years. Research published from the Annenberg Institute at Brown University in 2021 illustrated that Black & Latino, Lower-Income students, and those scoring poorly in 8th grade tests all see positive anticipated advantages in income and postsecondary enrollment after graduating from a CTE program. Overall, the report found evidence that CTE is associated with higher students' predicted cumulative earnings over the first seven years after high school.¹⁰ In CCSD, new programs like the Technical Training Academy are receiving investment because of projected increases in demand for skilled and technical workers in the manufacturing sector as the industry shifts towards automation and robotics integration, according to the Las Vegas Global Economic Alliance's 2022 Workforce Blueprint.¹¹ With its plans to provide access to 10+ STEM Industry-Based Credentials at-scale (which no other high school in our targeted zip codes provides), Rooted School–Clark County will be a unique high school option and local CTE leader by providing specialized training and education that could yield higher-paying entry-level jobs that our students' desperately need.

⁹ https://www.documentcloud.org/documents/21578883-2022-workforce-blueprint

¹⁰ Ecton, Walter G., and Shaun M. Dougherty. (2021). Heterogeneity in High School Career and Technical Education Outcomes. (EdWorkingPaper: 21-492). Retrieved from Annenberg Institute at Brown University: https://- doi.org/10.26300/4jwf-wb39

¹¹ https://www.documentcloud.org/documents/21578883-2022-workforce-blueprint

(2) Rooted School–Clark County will seek to meet the Academic and Demographic Needs Assessment's Demographics and Academic Needs indicators as defined above using a proven, researched, and responsible model.

(a) Demonstrated Capacity: Rooted School-Clark County's Founding Board of Directors has over 20+ years serving similar students and families in Las Vegas. Furthermore, Rooted School-New Orleans, Rooted School-Indianapolis, and Rooted School-Vancouver serve a comparable demographic as the expected demographic across our targeted zip codes. The table below compares our Board's experiences and the three Rooted schools' demographics to Rooted School-Clark County's expected demographic experience.

Demographics	FRL	EL	IEPs
Rooted School–Clark County Board of Directors	100%	42%	12%
Rooted School–New Orleans	100%	8%	23%
Rooted School–Indianapolis	100%	10%	20%
Rooted School–Vancouver	65%	15%	15%
Rooted School–Clark County	100%	42%	12%

(b) Research and Proof Points:

Using a similar academic model as the one that will be used at Rooted School–Clark County, Rooted School–New Orleans has been successful in its implementation of the following model features with the following results for its high-FRL student population which will serve as a template to build RS-CC into a 3, 4, or 5-star school:

Model Features	Rooted New Orleans Results + Evidence of Efficacy
McGraw-Hill Illustrative Mathematics AGA	 100% teacher alignment with full implementation of McGraw- Hill Illustrative Mathematics AGA strands and standards EdReports ranked this curriculum as Meets Expectations for a high-quality Math curriculum Aligned to Common Core (adopted by Nevada in 2010) Rooted New Orleans' state Math scores consistently above city averages for high schools (pre-pandemic)
UnboundEd Explore Curriculum for English Language Arts (ELA)	 100% teacher alignment with full implementation of UnboundEd Explore Curriculum strands and standards <u>EdReports</u> ranked this curriculum as Meets Expectations for a high-quality ELA curriculum (Note: UnboundEd is the same as Engage NY) Aligned to Common Core (adopted by Nevada in 2010) Rooted New Orleans' state ELA scores consistently above city averages for high schools (pre-pandemic)
Next Generation Science Standards (NGSS)	 100% teacher alignment with full implementation of Next Generation Science Standards (NGSS) Aligned to Common Core (adopted by Nevada in 2010) Rooted New Orleans' state Science scores consistently above city averages for high schools (pre-pandemic)
The DBQ Company - The DBQ Project	 100% teacher alignment with full implementation of DBQ Project Mini-Qs and DBQs Louisiana Believes ranked this curriculum as Tier 1 for

	exemplifying high-quality Social Studies curriculum, meeting all
	non-negotiable criteria and scored the best possible on all
	indicators of superior quality
	 100% teacher alignment with Deeper Learning Standards and Common Core standards
	- <u>Achieving the Common Core</u> released a report that identifies
Deeper Learning	the types and ranges of college- and career-ready skills
Standards	reflected in the Common Core State Standards in mathematics
	and English Language Arts/Literacy using two sets of skill
	statements–Deeper Learning Standards and the Career Cluster
	Essential Knowledge and Skills Statements
Solid Professor	 100% teacher alignment with full implementation of online course strands and standards
Autodesk Inventor	- 70% - 80% of Rooted students earn the Autodesk Inventor
Curriculum	(CAD software) credential annually through this online course
	- 100% teacher alignment with full implementation of online
Adobe Creative Cloud	course strands and standards
Suite (Print & Digital	- 70% – 80% of Rooted students earn Adobe Photoshop,
Media Publication)	Illustrator, and InDesign credentials annually through this
	online course
CompTIA A+ and	 100% teacher alignment with full implementation of online course strands and standards
CompTIA IT	 70% – 80% of Rooted students earn CompTIA cyber security
Fundamentals	credentials annually through these courses
	- Retained 90% of instructional staff (2020-2022)
	- Rooted's network of schools is rated one of the most innovative
	education models in the U.S. by the <u>Canopy Project</u>
	 Rooted School–New Orleans was renewed for a five-year
	charter term (2022/2023 – 2027/2028)
	- Rooted School–Indianapolis (high school) was invited and
	approved to open a middle school in the community by Fall 2022 after its first two years
	 A Charter School Growth Fund SEED portfolio school
Additional Proof	 Rooted New Orleans, Rooted Indianapolis, and Rooted
Points of Success	Vancouver are all in NewSchools Venture Fund Innovative
	Schools portfolio
	- From Rooted's first graduating class, 100% of seniors who
	wanted to go directly into four-year college were accepted and
	attend universities such as Case Western Reserve, Villanova,
	Tulane From Rooted's first graduating class, 100% of conjors who
	 From Rooted's first graduating class, 100% of seniors who wanted to go directly into high-growth/high-wage companies
	were hired and work at companies like Entergy (Energy),
	Ochsner Health (healthcare), and Lucid (IT company)
	centre neuril (neurileare), and faced (it company)

PARENT AND COMMUNITY INVOLVEMENT

(1) Describe the role to date of any parents, neighborhood, and/or community members involved in the development of the proposed school.

- Board Members and School Leader Four board members have spent over a combined 20 years living, working, and/or serving the North and East Las Vegas communities. Rooted School–Clark County has not yet identified a Founding School Leader.
- Focus Groups Rooted Clark County has conducted over 5 online forums since December 2020 and have interviewed and collected feedback from over 100 prospective students and parents since that time. During these interviews, we ask three questions:
 - What gaps exist amongst high school offerings in North and East Last Vegas?
 - What are the barriers to economic opportunity in the community?
 - What programs/initiatives would you like to see at a new high school in the community?

Through these ZOOM meetings and in-person presentations, the Rooted Clark County team was able to collect valuable information about what parents/guardians and students wanted to see in a new high school option. We have summarized most of the responses below using major themes that were talked about at-length:

- What haps exist amongst high school offerings in Clark County?
 - Not enough 4- and 5-star options
 - High schools are overcrowded, and students are getting lost
 - Difficult to trust schools to deliver on promises made in CCSD
 - Students are prepared for the changing workforce
- What are the barriers to economic opportunity in the community?
 - Lack of access to training programs
 - Lack of access to employers paying above a living-wage
 - Rising costs of expenses
 - Lack of affordability of college
- What programs/initiatives would you like to see at a new high school in the community?
 - Smaller school setting
 - Personalized learning environment
 - Sports program with different sports (i.e. basketball, football, debate, baseball, volleyball)
 - Active school clubs (i.e. baking, video games, art, music, electronics)
 - School mascot with something from the desert
 - Classes that will give students job experience and skills like engineering and computation

(2) Describe how you have engaged the local community to date as active partners in this application. What specific strategies have been implemented to date?

- ZOOM Interviews/Focus Groups + In-person presentations To-date the Rooted Clark County team has held informational interviews and presentations with over 100 prospective students and parents. The following questions were asked to further the impact of the school model. The various answers are documented above.
 - What haps exist amongst high school offerings in Clark County?
 - What are the barriers to economic opportunity in the community?

- What programs/initiatives would you like to see at a new high school in the community?
- Additional Outreach The Rooted Clark County team met with the following organizations to: (a) increase awareness about Rooted Clark County as a potential high school option in the Clark County community; (b) explore partnership with the parents and families they represent; (c) attend events and working group sessions; (d) and to hear of the services they provide. The direct needs of students (job placement, workforce development, college access, education innovation, etc.) were discussed and we sought advice on how Rooted Clark County and their programs could partner to achieve shared missions of training students and families for family-sustaining jobs opening in their community and state.
 - Nevada Partners
 - Ed.Xtraordinary (innovation arm of Teach For America Las Vegas)
 - City of North Las Vegas (Delen Goldberg)
 - UNLV (Devan Harris, Early Outreach Coordinator)
 - Las Vegas Global Economic Alliance
 - Vegas Chamber
 - o Governor's Workforce Development Board
 - Nevada Prep Charter School
 - Workforce Connections
 - College of Southern Nevada
 - o Tesla Workforce Development & Education Programs

(3) Describe how you will continue to engage parents, neighborhood, and community members from the time the school was conceptualized to when the application is approved through the opening of the school. What specific strategies will continue to be relied upon to establish buy-in and to learn parent priorities and concerns during the transition process and post opening?

The following practices will be employed to ensure visibility, partnership, engagement, and enrollment are all a priority during Y0 of school start-up:

Outreach and Partnership Events	Frequency	Participants
Newsletter Blasts and Text Blasts	Bi-Weekly (June 2022 – onward)	All interested parents/guardians and students
Hire a Community Outreach Coordinator	August 2022 –December 2022	Independent Contractor
Focus Groups and Rooted Clark County Pitch Nights (ZOOM and in-person at Nevada Prep)	Bi-Monthly (April 2022 – August 2023)	All interested parents/guardians and students
Digital Media campaign ran by Last Word Strategies (i.e. social media management, earned media, media production, media buying, etc.)	3-Month period (November 2022 – January 2023)	Targeted student demographic in across Clark County
Partner Hosted Events :	Quarterly (August 2022 –	All community members,

	onward)	parents/guardians, and
Back to School (Nevada		city/organizational leadership
Partners), Holiday		
Celebrations (East Las Vegas		
Community Center), etc.		
After school Rooted School-	Multi-week engagements	All interested
Clark County pilots	(starting January 2023 –	parents/guardians and
	August 2023)	students
Students could test various		
Industry-Based Certifications,		
design beginner video games		
in Unity game engine, learn		
digital media skills in Adobe		
Create Cloud Suite, etc.		

(4) Describe the Committee to Form or CMO's ties to and/or knowledge of the target community. What initiatives and/or strategies will you implement to learn from and engage the neighborhood, local community?

Since 2019, the CMO's Founder and CEO, Jonathan Johnson has been conducting research to determine if the Rooted School model is a fit for a community in Clark County, Nevada. After engaging with over 100 stakeholders, the CMO validated demand for a smaller, career-connected high school through conversations with community stakeholders in Clark County, focus groups with students, and survey data from area families.

Rooted Clark County was first recruited by Opportunity 180 to consider a school launch, then invitations came from other community leaders and stakeholders that include but is not limited to the Las Vegas Global Economic Alliance, Vegas Chamber, Governor's Workforce Development Board, Clark County Black Caucus, and Nevada Prep for RS-CC to open a new school option within the Clark County community because of a range of challenges and opportunities facing the community at this moment in time. Of all the questions the CMO raised during focus groups, there were two trends in their feedback that are summarized below. This feedback will be incorporated into the school model to ensure Rooted Clark County is truly unlocking economic opportunity for students and families within the Clark County community.

RS-CC's biggest barrier to success within the Clark County community has been shared by multiple community members within the focus groups and individual conversations. It is the negative perception of charter schools within some of the community's leadership and the need for Rooted to share a story and purpose that resonates as it builds broader brand awareness. Furthermore, Rooted needs to assemble a local team and partnerships that will ensure it achieves its stated mission as early as possible. Rooted Clark County has built a strong, community-centered board and is conducting the interview process for the Founding School Leader. Until the Founding School Leader is hired, the Rooted Clark County Board and Mr. Johnson will continue to build relationships over the authorization period and establish trust in the new high school option among the community. Examples of strategies the Rooted team will deploy to learn from and engage the neighborhood and local community are included below:

Strategy	Frequency	Participants
Newsletter Blasts and Text Blasts	Bi-Weekly (June 2022 –	All interested

	onward)	parents/guardians and students
Hire a Community Outreach Coordinator	August 2022 – December 2022	Independent Contractor
Focus Groups and Rooted Clark County Pitch Nights (ZOOM and in-person at Nevada Prep)	Bi-Monthly (April 2022 – August 2023)	All interested parents/guardians and students
Rooted School–Clark County hosted:	Bi-Monthly (September 2022 – August 2023)	All interested parents/guardians and
Community Fun Days (food trucks, RS-CC uniform design competition, video game tournaments, etc.)		students
Partner Hosted Events:	Quarterly (August 2022 – onward)	All community members,
Back to School (Nevada Partners), Holiday Celebrations (East Las Vegas Community Center), etc.		parents/guardians, and city/organizational leadership
After school Rooted School–Clark County pilots	Multi-week engagements (starting January 2023 – August	All interested parents/guardians and students
Students could test various Industry-Based Certifications, design beginner video games in Unity game engine, learn digital media skills in Adobe Create Cloud Suite, etc.	2023)	

(5) Describe any expectations for parent volunteering.

Once approved, Rooted School–Clark County will immediately seek to form a Parent Teacher Association amongst parents who choose to send their students to Rooted Clark County for high school starting August 2023. We will leverage prospective parents to facilitate our community events and recruit additional students and families to enroll at Rooted. Additionally, we will have at least one parent representative on Rooted Clark County's Board of Directors. This will ensure parents have a voice in matters of school governance and that our parents' needs are represented in Board deliberations.

(6) For each strategic partnership your school has established with community organizations, businesses, or other educational institutions that are part of the school's core mission, vision, and program other than the CMO/EMO identified in the application or dual-credit partners discussed in subsequent sections, please complete the table below. If there are future organizations that you plan to seek to partner with, please list those as well. Include, as Attachment 1, existing evidence of support from community partners such as letters of intent/commitment, memoranda of understanding, and/or contracts.

The following organizations represent current organizations we partner with and/or seek to partner with in the future.

Partner Name: Opportunity 180 - Support Letter Attached

	Ι	
Briefly describe this partnership	We have been in partnership with Opportunity 180 since 2019, specifically for funding, strategy, and forging community partnerships	
Specify the nature, purposes, terms, and scope of services of any such partnerships, including any fee-based or in-kind commitments from	Purpose: To further the financial sustainability, community partnerships, and regional strategy of Rooted School–Clark County	
community organizations or individuals that will enrich student-learning opportunities	Nature: Current/ongoing	
Partner Name: Mary Beth Sewald, President & CEG) of Vegas Chamber – Support Letter Attached	
Briefly describe this partnership	We plan to partner with the Ms. Sewald and the Vegas Chamber to support us in cultivating and securing local employer partners who will sit on our Industry Advisory Council (explained in the Academic Plan section) and hire our graduates through the Green Balloon Fellowship (explained in the Academic Plan section)	
Specify the nature, purposes, terms, and scope of services of any such partnerships, including any fee-based or in-kind commitments from community organizations or individuals that will enrich student-learning opportunities	Purpose: To establish employer partners in Southern Nevada's high-growth/high-wage jobs and careers that will hire our students when they graduate from our high school Nature: Beginning	
Partner Name: Jeremy Aguero, Principal of Applie		
Briefly describe this partnership	We plan to partner with Mr. Aguero and Applied Analysis to support us in cultivating and securing local employer partners who will sit on our Industry Advisory Council (explained in the Academic Plan section) and hire our graduates through the Green Balloon Fellowship (explained in the Academic Plan section)	
Specify the nature, purposes, terms, and scope of services of any such partnerships, including any fee-based or in-kind commitments from community organizations or individuals that	Purpose: To establish employer partners in Southern Nevada's high-growth/high-wage jobs and careers that will hire our students when they graduate from our high school	
will enrich student-learning opportunities	Nature: Beginning	
	Nature: Beginning	
Partner Name: John Guedry, CEO of Bank of Nevad Briefly describe this partnership		

Specify the nature, purposes, terms, and scope of	Purpose: To establish employer partners in
services of any such partnerships, including	Southern Nevada's high-growth/high-wage jobs and
any fee-based or in-kind commitments from	careers that will hire our students when they
community organizations or individuals that	graduate from our high school
will enrich student-learning opportunities	Nature: Beginning
Partner Name: Michael F. Bolognini, Vice President & Las Vegas Market Leader at Cox	

Partner Name: Michael F. Bolognini, Vice President & Las Vegas Market Leader at Cox Communications, Inc. – Support Letter Attached

Briefly describe this partnership	We plan to partner with Mr. Bolognini and the Las Vegas Market division of Cox Communications, Inc. to support us in cultivating and securing local employer partners who will sit on our Industry Advisory Council (explained in the Academic Plan section) and hire our graduates through the Green Balloon Fellowship (explained in the Academic Plan section)
Specify the nature, purposes, terms, and scope of	Purpose: To establish employer partners in
services of any such partnerships, including	Southern Nevada's high-growth/high-wage jobs and
any fee-based or in-kind commitments from	careers that will hire our students when they
community organizations or individuals that	graduate from our high school
will enrich student-learning opportunities	Nature: Beginning

Partner Name: Chris Wilcox, Partner in Charge at Eide Bailly LLP in Las Vegas – Support Letter Attached

Briefly describe this partnership	We plan to partner with Mr. Wilcox and Eide Bailly team to support us in cultivating and securing local employer partners who will sit on our Industry Advisory Council (explained in the Academic Plan section) and hire our graduates through the Green Balloon Fellowship (explained in the Academic Plan section)
Specify the nature, purposes, terms, and scope of	Purpose: To establish employer partners in
services of any such partnerships, including any	Southern Nevada's high-growth/high-wage jobs and
fee-based or in-kind commitments from	careers that will hire our students when they
community organizations or individuals that will	graduate from our high school
enrich student-learning opportunities	Nature: Beginning

Partner Name: Hugh Anderson, Managing Director and Partner at Hightower Las Vegas – Support Letter Attached

Specify the nature, purposes, terms, and scope of services of any such partnerships, including any fee-based or in-kind commitments from community organizations or individuals that will enrich student-learning opportunities	Purpose: To establish employer partners in Southern Nevada's high-growth/high-wage jobs and careers that will hire our students when they graduate from our high school
en fen stadent fearning opportanties	Nature: Current/ongoing

Partner Name: Jonas Peterson, President & CEO of Las Vegas Global Economic Alliance – Support Letter Attached

Briefly describe this partnership	We plan to partner with Mr. Peterson and the Las Vegas Global Economic Alliance to support us in cultivating and securing local employer partners who will sit on our Industry Advisory Council (explained in the Academic Plan section) and hire our graduates through the Green Balloon Fellowship (explained in the Academic Plan section)
Specify the nature, purposes, terms, and scope of services of any such partnerships, including any fee-based or in-kind commitments from community organizations or individuals that will enrich student-learning opportunities	Purpose: To establish employer partners in Southern Nevada's high-growth/high-wage jobs and careers that will hire our students when they graduate from our high school Nature: Beginning
Partner Name: Dr. Marta Meana, Professor of Psychology and Former University President of UNLV – Support Letter Attached	
Briefly describe this partnership	We plan to partner with Dr. Meana to support us in cultivating and securing local employer partners who will sit on our Industry Advisory Council (explained in the Academic Plan section) and hire

our graduates through the Green Balloon Fellowship

Specify the nature, purposes, terms, and scope of
services of any such partnerships, including
any fee-based or in-kind commitments from
community organizations or individuals that
will enrich student-learning opportunitiesPurpose: To establish employer partners in
Southern Nevada's high-growth/high-wage jobs and
careers that will hire our students when they
graduate from our high schoolNature: Beginning

Partner Name: Mark Brown, CEO at Miracle Flights – Support Letter Attached

Briefly describe this partnership	We plan to partner with Mr. Brown and Miracle Flights to support us in cultivating and securing local employer partners who will sit on our Industry Advisory Council (explained in the Academic Plan section) and hire our graduates through the Green Balloon Fellowship (explained in the Academic Plan section)
Specify the nature, purposes, terms, and scope of services of any such partnerships, including any fee-	Purpose: To establish employer partners in Southern Nevada's high-growth/high-wage jobs and

based or in-kind commitments from community organizations or individuals that will enrich student-learning opportunities	careers that will hire our students when they graduate from our high school Nature: Beginning
Partner Name: Mark Hutchison, Senior Partner at Attached	Hutchison & Steffen, PLLC – Support Letter
Briefly describe this partnership	We plan to partner with Mr. Hutchison and Hutchison & Steffen, PLLC to support us in cultivating and securing local employer partners who will sit on our Industry Advisory Council (explained in the Academic Plan section) and hire our graduates through the Green Balloon Fellowship (explained in the Academic Plan section)
Specify the nature, purposes, terms, and scope of services of any such partnerships, including any fee-based or in-kind commitments from community organizations or individuals that will enrich student-learning opportunities	Purpose: To establish employer partners in Southern Nevada's high-growth/high-wage jobs and careers that will hire our students when they graduate from our high school Nature: Beginning
Partner Name: Ryan Woodward, CFO at National Technical Institute – Support Letter Attached	
Briefly describe this partnership	We plan to partner with Mr. Woodward and the National Technical Institute to support us in cultivating and securing local employer partners who will sit on our Industry Advisory Council (explained in the Academic Plan section) and hire our graduates through the Green Balloon Fellowship (explained in the Academic Plan section)
Specify the nature, purposes, terms, and scope of services of any such partnerships, including any fee-based or in-kind commitments from community organizations or individuals that will enrich student-learning opportunities	Purpose: To establish employer partners in Southern Nevada's high-growth/high-wage jobs and careers that will hire our students when they graduate from our high school Nature: Beginning
Partner Name: Terry A. Shirey, President and CEO of Nevada State Bank – Support Letter Attached	
Briefly describe this partnership	We plan to partner with Mr. Shirey and the Nevada State Bank to support us in cultivating and securing local employer partners who will sit on our Industry Advisory Council (explained in the Academic Plan section) and hire our graduates through the Green Balloon Fellowship (explained in the Academic Plan section)
Specify the nature, purposes, terms, and scope of services of any such partnerships, including any fee-based or in-kind commitments from	Purpose: To establish employer partners in Southern Nevada's high-growth/high-wage jobs and careers that will hire our students when they graduate from our high school

community organizations or individuals that	
will enrich student-learning opportunities	Nature: Beginning
Partner Name: Chris Crooks and Larry Singer, bot Knight Frank – Support Letter Attached	h are Senior Managing Directors at Newmark
Briefly describe this partnership	We plan to partner with Mr. Crooks, Mr. Singer, and Newmark Knight Frank to support us in cultivating and securing local employer partners who will sit on our Industry Advisory Council (explained in the Academic Plan section) and hire our graduates through the Green Balloon Fellowship (explained in the Academic Plan section)
Specify the nature, purposes, terms, and scope of services of any such partnerships, including any fee-based or in-kind commitments from community organizations or individuals that will	Purpose: To establish employer partners in Southern Nevada's high-growth/high-wage jobs and careers that will hire our students when they graduate from our high school
enrich student-learning opportunities	Nature: Beginning
Partner Name: Victoria VanMeetren, Special Advisor to the Dean and Business Development for GENESIS at Roseman University – Support Letter Attached	
Briefly describe this partnership	We plan to partner with Ms. VanMeetren to support us in cultivating and securing local employer partners who will sit on our Industry Advisory Council (explained in the Academic Plan section) and hire our graduates through the Green Balloon Fellowship (explained in the Academic Plan section)
Specify the nature, purposes, terms, and scope of services of any such partnerships, including any fee-based or in-kind commitments from community organizations or individuals that will enrich student-learning opportunities	Purpose: To establish employer partners in Southern Nevada's high-growth/high-wage jobs and careers that will hire our students when they graduate from our high school Nature: Beginning
Partner Name: Karla Perez, Vice President Acute Division Regional Vice President of University Health Services – Support Letter Attached	
Briefly describe this partnership	We plan to partner with Ms. Perez and to support us in cultivating and securing local employer partners who will sit on our Industry Advisory Council (explained in the Academic Plan section) and hire our graduates through the Green Balloon Fellowship (explained in the Academic Plan section)
Specify the nature, purposes, terms, and scope of services of any such partnerships, including any fee-based or in-kind commitments from community organizations or individuals that will enrich student-learning opportunities	Purpose: To establish employer partners in Southern Nevada's high-growth/high-wage jobs and careers that will hire our students when they graduate from our high school
	Nature: Beginning

Partner Name: Irene Bustamante, Deputy Director & Chief Strategy Officer of Workforce Connections		
Briefly describe this partnership	Rooted School Foundation's CEO, Jonathan Johnson, was invited to participate in the working group for healthcare and plans to partner with Ms. Bustamante Workforce Connections to support us in cultivating and securing local employer partners who will sit on our Industry Advisory Council (explained in the Academic Plan section) and hire our graduates through the Green Balloon Fellowship (explained in the Academic Plan section)	
Specify the nature, purposes, terms, and scope of services of any such partnerships, including any fee-based or in-kind commitments from community organizations or individuals that will enrich student-learning opportunities	Purpose: To establish employer partners in Southern Nevada's high-growth/high-wage jobs and careers that will hire our students when they graduate from our high school Nature: Current/ongoing	
Partner Name: Chris Reilly, Director of Workforce Development & Education Programs at Tesla		
Briefly describe this partnership	We plan to partner with Mr. Reilly and Tesla to support us in cultivating and securing local employer partners who will sit on our Industry Advisory Council (explained in the Academic Plan section) and hire our graduates through the Green Balloon Fellowship (explained in the Academic Plan section)	
Specify the nature, purposes, terms, and scope of services of any such partnerships, including any fee-based or in-kind commitments from community organizations or individuals that will enrich student-learning opportunities	Purpose: To establish employer partners in Southern Nevada's high-growth/high-wage jobs and careers that will hire our students when they graduate from our high school Nature: Prospective	
Partner Name: Soenda Howell, Partner at Charter School Growth Fund – Support Letter Attached		
Briefly describe this partnership	CSGF has partnered with Rooted School's during its initial phases of growth and, if approved in Nevada, we will be considered for additional grant funding	
Specify the nature, purposes, terms, and scope of services of any such partnerships, including any fee-based or in-kind commitments from community organizations or individuals that will enrich student-learning opportunities	Purpose: To establish employer partners in Southern Nevada's high-growth/high-wage jobs and careers that will hire our students when they graduate from our high school Nature: Beginning	

(3) <u>Academic Plan</u>

TRANSFORMATIONAL CHANGE

In its 2019-2024 <u>Strategic Plan</u>, the SPCSA lists goals related to school performance that charter school applicants must consider in setting their own respective goals:

- 1. Provide families with high quality schools. The SPCSA aims for a majority of schools to be rated as 4or 5-stars.
- 2. Ensure that every SPCSA student succeeds including those from historically underserved student groups: the SPCSA aims for all sponsored schools to demonstrate strong academic growth, high levels of proficiency and on-time graduation across all student groups, including historically underserved student groups.

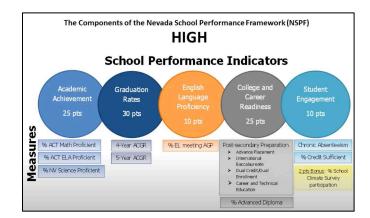
(1) How will you ensure that your school either earns a 4- or 5-star rating or is on track to earn a 4- or 5-star rating by the end of your first charter term?

(2) How will you drive growth among students at all achievement levels, accelerating the levels of proficiency and on-time graduation of those who are most behind?

(1) How will you ensure that your school either earns a 4- or 5-star rating or is on track to earn a 4- or 5-star rating by the end of your first charter term?

At the heart of Rooted Clark County's mission is an educational model that prepares all students for successful entry into any post-secondary path of their choosing while displaying the social-emotional skills and social justice mindsets learned through our advisory program and restorative practice approach. Through our learning environment and commitment to Self Directed Learning, Industry-Based Credentials and Internships, and Project Based Learning, Rooted Clark County will be a commendable school in Southern Nevada by the end of its first charter term that closes opportunity gaps for all students and subgroups.

Point #1: Focused Coaching and Consultation – We will ensure our leadership (School Leader and Assistant School Leader) are receiving regular consulting and coaching from <u>Attuned Education Partners</u> founded by a group of school founders from the award-winning and academically rigorous Uncommon Schools of the east coast. From the beginning of the school year, Our school leaders and the Attuned team will align their coaching priorities to the Nevada Department of Education's High School Performance Framework (below), which is currently used to give star ratings.



Point #2: Implementation of a Research-Backed Rigorous Curriculum – Through our use of UnbounEd Explore (the same as Engage NY) for ELA and Illustrative Mathematics AGA for Mathematics curriculum (research-backed and used in many successful school models around the U.S.), we ensure that

our students get daily exposure to a highly rigorous, researched, and aligned curriculum by well-prepared teachers. Both curricular choices fully Meet Expectations in their alignment to Common Core State Standards and to structural supports and usability.

Point #3: Data-Driven Instruction – Both our New Orleans and Indianapolis schools adapt this curriculum in response to initial diagnostic and assessment data to meet our students' academic growth goals. Our academic teams meet weekly in data dive meetings to reflect on student progress and make strategic interventions and enrichments as needed. Using data-centered approaches to inform classroom instruction is one of the most effective ways to increase student achievement.

Point #4: Social-Emotional Curriculum and Skill Development – Rooted Clark County will use Developmental Designs and Sown to Grow as facets of its (SEL) curriculum. Developmental Designs is widely known as a research-backed and culturally responsive curriculum.¹² A 2017 study found that implementing the Developmental Designs program increases feelings of connectedness and perceived belongingness for general education students and students with disabilities.¹³ Moreover, we use Sown to Grow because we noticed that our Rooted New Orleans students needed more executive functioning support to progress through the self-guided coursework and identified planning for success and problem solving as entry points to help students improve and connect their daily goals to longer term goals. These programs, coupled with the advisor's attachment-based teaching methods, create an environment in which students cand thrive with a sense of constancy, safety, and community.

Point #5: Rigorous Professional Development – Rooted staff engage in weekly professional development opportunities that push them to grow as educators through differentiated individual development and data informed group development.

Point #6: National Best Practices – We will ensure our school leadership is a part of the continuous support cohort from NewSchools Venture Fund and Charter School Growth Fund. Both funders offer access to advisors and coaches for top-performing school networks such as Success Charter Schools, Uncommon Schools, and IDEA Public Schools. Rooted School Foundation has been a member of the NewSchools portfolio since 2016 and the CSGF portfolio since 2019.

(2) How will you drive growth among students at all achievement levels, accelerating the levels of proficiency and on-time graduation of those who are most behind?

At the start of each school year, Rooted Clark County uses Achieve3000 (ELA) and IXL Real-Time Diagnostics (Pre-Algebra and Match Fact Fluency) to identify each student's academic strengths and areas of growth. We establish goals based off a student's baseline scores at the beginning of the school year and develop a learning acceleration plan for that individual student. Teachers, administrators, and interventionists then collaborate to identify the common trends amongst students to create individual, small group, and whole group interventions to obtain at least two years of growth for each student by the end of the school year. Before the second semester, Rooted Clark County repeats this process to identify high leverage skills and knowledge while evaluating the effectiveness of our previous interventions and

¹² The Origins Program. (2014). The Developmental Designs Approach. Retrieved from <u>https://www.originsonline.org/sites/default/files/downloads/2014 dd fact sheet-secured.pdf</u>

¹³ Probst, Emmalene Hall. (May 2017). The Effect of Implementation of the Developmental Designs for Middle School (DDMS) Program On The Social Skills of 7th Grade Students. Department of Interdisciplinary and Inclusive Education at Rowan University.

creating additional plans to address any gaps in learning that are barriers to reaching two years of academic growth.

We continuously monitor the efficacy of our learning acceleration plans and interventions in how students are mastering grade level content. We utilize Multi-Tiered System of Supports (MTSS) to address the academic and behavioral needs of all students. Through the use of exit tickets and weekly data meetings, our school teams monitor the progress of all students to determine what skills, objectives, and standards need to be reviewed or retaught while identifying the mechanism and tiered support that is most effective for doing so (whole group, small group, or individual). At interims, unit assessments, and module assessments, our instructional teams strategically breakdown this data identify additional interventions that will accelerate the learning of individual students. All students are provided the interventions and tiered support that is necessary to stimulate growth to reach their yearly goals.

High quality curricular resources support our staff in remediating and pushing student growth. Through programs like IXL, Achieve3000 progress monitoring assessments, or Solid Professor, Rooted Clark County students are constantly pushing themselves to learn and grow. To drive the academic achievement of our students performing at all levels, Rooted Clark County utilizes community centered enrichment opportunities and a research based high ability program to support all students in their growth. We believe that consistent family communication and student engagement is at the center of student growth.

Rooted Clark County will continuously update families on student progress through consistent communication between families, teachers, and administrators, quarterly conferences centered around student growth, and offering constructive feedback on how Rooted can improve for their child. Each of these strategies gives us an avenue to discuss student progress and growth while we invest and support our families in the knowledge and skills to help their students grow. For students, our instructional staff modifies and adapts our curriculum to be relevant to students' interests, communities, and identities. Recognizing that students need support in more than academics and curriculum, our behavior intervention team continuously identifies students in need of MTSS supports through teacher, family, and stakeholder input.

- (3) Describe the distinguishing features of your school, including programming and curricular choices that make your school unique. For each feature, describe how it will be implemented. Key features may include:
- (a) Programs (e.g., curriculum, PD, afterschool program, parent program, etc.)
- (b) Principles (e.g., no excuses, individualized learning, learn at your own pace, etc.)
- (c) Structures (e.g., blended learning, small learning communities, small class sizes, etc.)

The combined responses to this question are below.

(4) Describe the reasons for which the features you described in (3) will influence student success. Please provide evidence from your own experience and/or valid research.

The combined responses to this question are below.

(5) Are there any portions of an existing network or school's model that you will utilize in this proposed school? If so, please identify and describe the student performance results of that particular programming.

Rooted Clark County believes that all students deserve a strong, rigorous education that will ensure global competitiveness, regardless of their zip code or socio-economic status. We believe that all students,

regardless of their background should have a chance to earn a family-sustaining wage early on in their lives. Furthermore, we offer opportunities to understanding the inner wealth they already possess, how to repair harm they will inevitably cause, and maintaining a constant willingness to improve. To grasp the opportunities afforded by the fastest growing industries and jobs in a region, students must be trained in the habits of modern work and have a base knowledge of some of the most important technologies in modern times. We believe every student who enrolls at Rooted Clark County is entitled to the "Four-Year Promise" – After four years at Rooted School, every student has a chance to earn a college acceptance in one hand and a job offer in the other.

Rooted Clark County will provide an emotionally safe space where students will feel like they can be their genuine selves. With high quality educators, a positive atmosphere, and exceptional school leadership, our students will become change-agents in their neighborhoods and in this country. Rooted Clark County's educational model is designed around the needs of four key "partners" of an urban school: the students, teachers, families, the community. The demands and needs of each group drives the design of core programmatic elements.

Core Values – Rooted Clark County's academic and school culture plan is built on five core values: Growth (we push ourselves to grow at all times), Preparation (we are prepared), Excellence (we push the limits of what is possible), Hospitality (we put people first), Community (we never forget where we come from). These five values lead all recruitment, development, and instruction of our students and staff to ensure a strong culture.

Academic Philosophy – Rooted Clark County's academic philosophy is fundamentally designed around three core beliefs. The first is that all students can, and will, learn when provided with relevant and aligned curriculum across the core content areas and STEM pathways we will offer. The second belief is that students learn best when exposed to a hybrid-learning environment that optimizes each student's school experience through personalization and integration of modern learning technologies. Lastly, we believe that the integration of knowledge and skills in digital literacy in all subjects will engage and motivate students to explore high-demand careers. These are the fields in which skilled individuals will create the new ideas, new products, and new industries of the future. These are also fields that will demand the collaborative information skills and technological fluency of digital citizenship.

Our innovative classrooms represent the connected world our students live in. We are intentional in our shift away form direct instruction as the sole mode of information delivery to one that more closely mirrors the 21st century collegiate instructional model, blending real-time lecture and small group instruction with online learning and virtual lab studies. Using a hybrid-learning model, classroom teachers harness the power of technology to create more engaging, efficient, and success-oriented learning environments. In turn, these conditions foster the annual earning of Industry-Based Credentials (IBCs) and experience in the 21st century college environment and/or workplace.

Instructional Methods – Outside of the home and family unit, Rooted School believes that a school serves as the single greatest factor in providing strength and high-expectations for a student. Our instructional methods are grounded in rigorous academics and a conscious development of the identity. To best support our students towards achieving the Four Year Promise, and to reach the needs of diverse learners, Rooted Schools' educators will use a variety of instructional strategies so that every minute of every day is used to maximize instruction. Through these methods, our students will learn both academically and personally by connecting instruction to cultural relevancy. The following instructional methods are overarching and fundamental to instruction in every class. They represent essential school design elements allowing us to realize our mission, vision, and core beliefs:

- Program 1: Self-Directed Learning
- Program 2: Industry-Based Credentials (IBCs) and Internships
- Program 3: Project Based Learning

Program 1: Self-Directed Learning

Rooted Clark County uses Malcolm Knowles' definition of self-directed learning as a starting point and defines self-directed learners as those who need very little, if any, re-direction because they know their goals and are focused on achieving them.¹⁴

Rooted Clark County students will need to be self-directed in the workplace, particularly in innovative technology fields. The OECD's The Future of Education and Skills: Education 2030 report states that future-ready students must exercise learning agency, and help learners enable their own agency. The first is a personalized learning environment that supports and motivates each student to nurture his or her passions, make connections between different learning experiences and opportunities, and design their own learning projects and processes in collaboration with others. The second is building a solid foundation: literacy and numeracy remain crucial.¹⁵ At Rooted Clark County, students will be able to move at their own pace through all of the required course content from grades 9-12. Within self-directed learning, students create the tempo for their own learning with the support of their respective content area teachers. Once students have achieved mastery of the foundational concepts, they are able to move ahead with new and more challenging course content instead of having to wait on their peers. Teachers can spend more time with struggling students and give them targeted support.¹⁶ Rooted Clark County will primarily use two approaches to facilitate its self-directed learning model:

- Flexible blended learning environment
- Personalized learning plans

Flexible Blended Learning Environment – At Rooted Clark County, students engage in blended learning.¹⁷ Students first progress through each course playlist at their own pace. Next, they receive teacher-directed instruction and work on adaptive software in a teacher-supported learning environment. Students will typically have seven, Self-Directed Learning blocks each day, focused on a core content area or on an elective topic.

The course playlist is completed online for a portion of the period. Then, during the same block, students rotate into other types of supports to enhance their understanding of the content. Teachers and interventionists provide face-to-face support through small-group instruction, group projects and individual tutoring. Additionally, students log into adaptive software programs to help them build core skills in math and reading, ensuring they can access grade-level content.

To create the course playlists, instructional staff (teachers, the school leader, the director of student services) adapts the scope and sequence from high-quality, standards-aligned curriculum for each subject. All courses are aligned to both the Nevada State standards and to additional cognitive standards as

¹⁶ Brookfield, S. D. (1994). 'Self-directed learning' in YMCA George Williams College ICE301 Lifelong learning, Unit 1 Approaching lifelong learning. London: YMCA George Williams College. Available in the informal education archives. Retrieved from https://infed.org/mobi/self-directed-learning/ ¹⁷ Powell, A., Watson, J., Staley, P., Patrick, S., Horn, M., Fetzer, L., Hibbard, L., Oglesby, J. & Verma, S. (July 2015). Blended Learning: The Evolution of Online and Face-to-Face Education from 2008-2015. iNACOL, The International Association for K-12 Online Learning. Retrieved from https://files.eric.ed.gov/fulltext/ED560788.pdf

¹⁴ Self-directed learning. (2020, May 19). Retrieved August 28, 2020, from <u>https://infed.org/mobi/self-directed-learning/</u>

¹⁵ The future of education and skills Education 2030. (2018). Retrieved August 26, 2020, from <u>https://www.oecd.org/education/2030/E2030%20Position%20Paper%20(05.04.2018).pdf</u>

determined by the instructional leadership team. All student work is input through the Google Classroom online platform.

The playlists house detailed course syllabi, that include:

- Daily lesson objectives aligned to learning standards, unit skills, content, and essential questions
- Graded and ungraded formative assessments
- Graded and summative assessments
- Academic badge assessments
- Core readings, supplemental texts, videos and other lesson materials
- Semester projects and enrichment work

Personalized Learning Plan – The second Self-Directed Learning methodology is through Personalized Learning Plans (PLPs).

- Student PLPs house:
- Course playlists
- Portal to submit work to teachers for feedback
- Space to progress monitor progression towards academic goals, such as Lexile growth.

The PLP helps faculty to track students' progression through their academic coursework and measures their mastery of standards through a sequence of assessments and the earning of academic badges. Each course is divided into 4-10 badges, or units of study, wherein students have to demonstrate a mastery grade of at least 75% in order to move on to the next badge. Progress data is available for students to assess their own course progression.

We aim to create intellectual engagement by providing students a compelling rationale for the way they are learning, what they are learning and why they are learning. Rooted teachers create a clear bar for mastery and as much student autonomy as possible to meet each standard. This allows for what Daniel Pink, in Drive: The Surprising Truth About What Motivates Us, calls, "Mastery, autonomy, and purpose." Our technology use empowers teachers to make more effective and timely data-driven instructional decisions, using available student progress and performance data. Teachers are aware of student challenges and successes, putting them in a position to adjust instruction immediately. This high degree of efficacy enables our teachers to design their instruction around the unique needs of each student and/or small group.

Examples of Successful Networks and Schools Using Self-Directed Learning Methods:

- **KIPP San Francisco College Preparatory** serves a population where at least 86% of students are low-income, 63% are Hispanic/Latino, and 27% are African-American. Out of 1,612 high schools in California, the school ranks #13 in Math and Reading Performance, #197 in math and Reading Proficiency, and #73 in its College Readiness Index. In every performance category, they exceed their district in serving a similar student population.¹⁸
- **USC Hybrid High School** in Los Angeles, CA, serves a population where at least 85% of students are low-income, 80% are Hispanic/Latino, and 18% are African-American. Out of 1,612 high schools in California, the school ranks #38 in Math and Reading Performance, #341 in math and

¹⁸ U.S. News and World Report. (n.d.) Best High Schools. U.S. News and World Report. Retrieved from https://www.usnews.com/education/best-high-schools/california/districts/san-francisco-unified-school-district/kipp-san-francisco-college-preparatory-153508.

Reading Proficiency, and #122 in its College Readiness Index. In every performance category, they exceed their district in serving a similar student population.¹⁹

Program 2: Industry-Based Credentials (IBCs) and Internships

A strong cradle-to-career science, technology, engineering and mathematics (STEM) education prepares students for high-demand and high-paying jobs in Nevada. Furthermore, students on a strong career pathway, accessed through STEM education, contribute to the vitality of their families, communities, and local economies.

Nevada faces a serious workforce shortage in industries that demand skills in science, technology, engineering and math (STEM). Too few Nevadans consider STEM careers, in large part because they are not exposed to STEM education as students. Nevada's future depends on its students being prepared to meet a wide variety of challenges. Those who have a solid foundation in real-world problem solving and experimentation, the bedrock of a rigorous STEM education, become confident, critical thinkers with the creativity to find solutions to the challenges they face. No matter the career pathway they pursue after high school, all students benefit from the skills learned in STEM.

-Brian Mitchell, Director of the Nevada State Office of Innovation, Science and Technology

Department of Labor Statistics estimate that Nevada STEM jobs are currently earning a mean hourly wage ranging from a low of \$25.86 to a high of \$54.74 with an annual mean salary ranging from \$53,790 to \$113,860.

Industry-Based Credentials (IBCs) – At RS-CC, students will be expected to earn at least one IBC for each year of their high school experience; some will earn as many as two or even three in any given year. At least 95% of our students will graduate with four or more IBCs by the end of their senior year. IBCs are earned in elective courses that run primarily as self-directed learning blocks. These electives are created based on our Nevada industry partners' needs. Students will have the opportunity to earn those credentials that align directly to what a local employer is seeking in the region.

Internships – The Clark County Nevada region provides a unique opportunity as a proof point for a new possibility in Nevada. Our business, education and community partners (Workforce Development Committee of the Las Vegas Chamber of Commerce, the Nevada Workforce Development Board, etc.) are working to close credentialing gaps, especially for students of color and students from low-income families—Rooted Clark County's anticipated student population (i.e. low income students, Black and Latinx students and students with exceptionalities). They aim to increase the number of local students who become local engineers, IT professionals, healthcare professionals, and manufacturing professionals. Throughout a student's experience at Rooted, they will have the opportunity to apply and learn additional skills in year-round internship experiences with our regional employer partners. The goal of these experiences is to cultivate a relationship between the students and prospective future employers while also preparing the students to meet entry-level qualifications within the relevant industries.

By way of example, some students at Rooted New Orleans have completed internships as print lab technicians with skills they acquired after earning the IBC for Autodesk Inventor – a computer-aided design (CAD) software used in additive manufacturing companies.

Examples of Successful Networks and Schools Using IBCs and Internships:

¹⁹ U.S. News and World Report. (n.d.) Best High Schools. U.S. News and World Report. Retrieved from https://www.usnews.com/education/best-high-schools/california/districts/san-francisco-unified-school-district/kipp-san-francisco-college-preparatory-153508.

- **Rooted School–New Orleans**: Our flagship school serves a population where 100% of students receive free or reduced-priced lunch, more than 86% are African-American, more than 7% are Hispanic/Latino, and more than 21% have a disability. Based on its own internal research, at least 60% of students earn an IBC each year they attend Rooted New Orleans. This is the highest credential attainment per capita of any high school in the state of Louisiana. About 25% of students completed internships each year of the school's operation.
- **Urban Assembly (New York, New York)**: We were inspired by their integration of IBCs with workbased learning opportunities with core content classes. The Urban Assembly features over 20 career pathways, dozens of related work-based learning experiences, and partnerships with over 30 leading industry employers according to their own internal reporting. With 95% minority student population, the school outperformed district and state averages in Reading on the New York Regents examinations.²⁰

Program 3: Project-Based Learning (PBL)

To demonstrate mastery learning, RS-CC students apply their skills in solving real-world challenges through Project-Based Learning.²¹

Students work on projects that are designed with our tech industry partners in mind. For example, at Rooted School—New Orleans, our Lee Circle Project trained students in Autodesk Inventor, a typical CAD software program used throughout the industry for 3D printing and manufacturing. Students addressed the question, "How might New Orleans build monuments that better represent what our city stands for?" As a result of these projects, students saw the impact of their work in the community and acquired career and technical education credits through several different technology pathways and industry-focused projects.

Using a backward-design approach, the goal is to solidify industry-specific skills that positively impact stakeholder "clients". In turn, our students graduate more prepared to choose a college and a concentrated field of study or directly enter jobs within our partner network.

Project-Based Learning manifests itself in Rooted Clark County 's instructional model in two significant ways:

Industry-Focused Project-Based Learning – Daily, in elective course blocks students will acquire career and technical education credits and credentials in technology pathways by completing two industry-focused projects each year. Rooted's teachers will co-plan these projects with the Industry Advisory Council (IAC). Students will be assessed on them using a Project-Based Learning rubric that incorporates industry, social justice, computer science, MHA Labs Skill Building Blocks, and Deeper Learning standards.

Project Exhibitions – Rooted Clark County invests in student/staff collaboration with our industry partners through public project exhibitions. With the aid of their teachers and our industry partners, students will spend a semester working toward the completion of a project within a technology pathway. At the end of the semester, students are evaluated by a panel of industry experts who specialize in the skills and topics relevant to the project. Students also participate in a peer-review process like what would occur if they were working in a technology firm in Nevada or anywhere in the United States. As a result, project exhibitions are challenging experiences that create a significant source of student pride and relevant learning.

²⁰ Urban Assembly. (nd). Impact. Retrieved August 28, 2020

²¹ What is PBL? (n.d.). Retrieved August 27, 2020, from https://www.pblworks.org/what-is-pbl

Examples of Successful Networks Using Project-Based Learning

While there is ample evidence about the effectiveness of PBL with secondary low-income students²², students with disabilities²³, and students of color²⁴, when Rooted School Foundation's founder began piloting the school model in 2014, there was (and still is) a limited body of research available about the efficacy of industry-focused project-based learning amongst high-poverty, high-trauma populations.

As a result, he launched a pilot within an existing high school during the 2015-2016 school year to execute his best interpretation of the available research. This work took nearly six years of research, piloting and evolution of the model.

Several innovative schools informed the iteration of Rooted Schools that exists today. These include:

- **High Tech High (San Diego, CA)**: We continue to use the project-based learning framework to guide our own. High Tech High ranks near the top in raw scores on California standardized tests (94th percentile). Since opening, HTH has been one of the highest scoring schools in San Diego County, California.²⁵
- **Summit Public Schools (Northern California and Washington State**)²⁶: We used their flexible blended learning model as the initial inspiration for building our own. From their inaugural graduating class until now, 98% of all Summit graduates have been accepted into at least one four-year college.
- Acton Academy (Austin, TX, and around the world)²⁷: We used their mastery-based progression and flexible-blended learning model as inspiration for our own. Known as a leader in learning trends, Acton is a leading example of micro-schools that organizes learning as skill sprints, projects, and dialogs.
- **Science Leadership Academy (Philadelphia, PA)**²⁸: We used their project-based learning framework as inspiration for our own. With a minority student enrollment of 66% and a 100% low-income, SLA had an 87% proficiency rate on state exams in math and reading19

²² Creghan, C., & Adair-Creghan, K. (2015). The Positive Impact of Project-Based Learning on Attendance of an Economically Disadvantaged Student Population: A Multiyear Study. Interdisciplinary Journal of Problem-Based Learning, 9(2). Available at: https://doi.org/10.7771/1541-5015.1496

²³ Koenemann, J. (2018, April 23). How Project-Based Learning Helps Special Needs Students Collaborate and Connect. Retrieved August 27, 2020, from

https://www.gettingsmart.com/2018/04/how-project-based-learning-helps-special-needs-student s-collaborate-and-connect/

²⁴ Cervantes, B., Hemmer, L., & Kouzekanani, K. (2015). The impact of project-based learning on minority student achievement: Implications for school redesign. NCPEA Education Leadership Review of Doctoral Research, 2(2), 50-66

²⁵ High Tech High. (2019-2020). 2019-2020 School Profile. Retrieved August 28, 2020, from https://www.hightechhigh.org/hth/wp-content/uploads/sites/10/2019/12/HTH_School_profile-2 019-20.pdf

²⁶ Summit Public Schools. (nd). Our Results. Retrieved August 28, 2020, from https://summitps.org/the-summit-model/our-results/

²⁷ Ark, T. (2019, August 21). Acton Academy: Hero Launchpad Goes Global. Retrieved August 28, 2020, from https://www.forbes.com/sites/tomvanderark/2019/08/21/acton-academy-hero-launchpad-goes-global/

²⁸ U.S. News and World Report, W. (nd). How Does Science Leadership Academy Rank Among America's Best High Schools? Retrieved August 28, 2020, from

https://www.usnews.com/education/best-high-schools/pennsylvania/districts/philadelphia-publi c-schools/science-leadership-academy-17209

• **P-TECH (Brooklyn, NY)**: We used their model for industry partnerships as inspiration for how we might build our own. With upwards of 600 industry partners, their first cohort graduated at 4x the on-time national community college graduation rate, 5x for low-income students. Furthermore, a recent MDRC evaluation of New York City P-TECH schools showed that most students begin college coursework in tenth grade and that students accumulate more credits than students in other schools. They also take and pass New York state tests earlier and at faster rates than other students.²⁹

CURRICULUM & INSTRUCTIONAL DESIGN

The framework proposed for instructional design must both reflect the needs of the anticipated population and ensure all students will meet or exceed the expectations of the Nevada Academic Content Standards.

(1) In accordance with NRS 388A.246, provide a description of the proposed instructional design of the charter school and the type of learning environment the charter school will provide, including, without limitation, whether the charter school will provide a program of distance education, the planned class size and structure, the proposed curriculum for the charter school and the teaching methods that will be used at the charter school. Required courses, such as physical education, financial literacy³⁰ and computer science³¹, should be included.

A combined response is located below.

(2) Describe the instructional strategies that you will implement to support the education plan and why they are well suited for the anticipated student population. Outline the data, methods, and systems teachers will use to provide differentiated instruction to all students.

A combined response is located below.

(3) Explain how the proposed instructional model and curriculum will be used to meet the needs of and enable measurable growth for all students according to the Nevada Academic Content Standards, including those that need remediation and those that are intellectually gifted.

While the curriculum choices below offer unit plans that are already highly aligned to Common Core State Standards (adopted by Nevada), Rooted Clark County believes in leveraging the full creativity and expertise of our teachers in creating their own daily lesson plans. Teachers will receive explicit professional development in lesson plan format and content, and how to utilize the following curriculum to effectively scaffold lessons that target groups behind grade-level, groups at grade-level, and students who are above grade level.

Teachers will submit their lesson plans to be reviewed by the School Leader and/or Assistant School Leader on a weekly basis; teachers requiring additional supports and development will be identified through these checks. In addition, teachers will also submit Small Group lesson plans, detailing the groups and content to be taught when this instructional strategy is being utilized. To ensure that the needs of all students are being met, teachers will collaborate with both the Special Education and English Learner teachers to include best practices in serving our diverse learners including highly scaffolded lesson plans.

²⁹ Rosen, Rachel,Byndloss, D. Crystal, Alterman, Emma, Dixon, Michelle. (May 2020). Bridging the School-to-Work Divide: Interim Implementation and Impact Findings from New York City's P-TECH 9-14 Schools. MDRC. Retreived August 28, 2020, from

https://www.mdrc.org/sites/default/files/P-TECH_Report_2020.pdf

³⁰ NRS 389.074

 $^{^{31}}$ NRS 389.072

In addition, teachers will be required to provide evidence of differentiation in their lesson plans; plan Small Group lessons, which address specific student needs in small groups; and submit their plans to the Special Education and EL teacher weekly, so they can plan lessons which reinforce ideas being taught in class. While the main curriculum below will be used as the framework for our year-long curriculum design, Rooted Clark County will also utilize a variety of other resources to supplement this content. These resources will enhance the content of the programming, allow for differentiation of instruction in class and in our Small Group model, and reinforce the content taught in the identity curriculum. These supplementary materials for Math and ELA, as well as the intended curriculum resources for other core subjects (Science, Social Studies, Identity) are listed below in the blue graph.

Curriculum: Illustrative Math AGA Alignment to Nevada

Rooted Clark County will use the Illustrative Math AGA curriculum which is highly aligned to Nevada Academic Content Standards, as evidenced by <u>EdReports</u>. The materials reviewed by EdReports for McGraw-Hill Illustrative Mathematics AGA series meet expectations for Alignment to the CCSSM. The materials meet expectations for all indicators in Focus and Coherence (Gateway 1), and the materials meet expectations for all indicators in Rigor and Mathematical Practices (Gateway 2).³² Illustrative Math AGA is the only curriculum found by EdReports to align fully with the Common Core State Standards and Nevada Academic Content Standards for Mathematics for all high school grades, Grade 9 – Grade 12. EdReports offers detailed analyses which demonstrate how each grade of Illustrative Math AGA aligns with specific state standards.

Curriculum: UnboundEd Explore ELA Alignment to Nevada

Rooted Clark County will use the UnboundEd Explore ELA (widely known as Engage NY) curriculum for grade 9-12 which is not only highly aligned to Common Core (adopted by Nevada in 2010) but is also an extension of the 6-8 Engage NY curriculum that is highly-rated by EdReports.³³ Furthermore, the grade-specific standards are a direct complement to the College and Career Readiness (CCR) anchor standards.³⁴ The former providing specificity to the standards, the latter providing broad standards that, together, define the skills and understandings that all students must demonstrate by the end of each grade in Nevada's Academic Content Standards for ELA.

Curriculum: Next Generation Science Standards Alignment to Nevada Academic Content Standards for Science (NACSS)

Rooted Clark County will use the Next Generation Science Standards which is aligned to Common Core (adopted by Nevada in 2010) and the Nevada Academic Content Standards for Science.³⁵ Students in high school continue to develop their understanding of the four core ideas in the physical sciences. These ideas include the most fundamental concepts from chemistry and physics, but are intended to leave room for expanded study in upper-level high school courses. The high school performance expectations in Physical Science build on the middle school ideas and skills and allow high school students to explain more in-depth phenomena central not only to the physical sciences, but to life and earth and space sciences as well. These performance expectations blend the core ideas with scientific and engineering practices and crosscutting concepts to support students in developing useable knowledge to explain ideas across the science

 $^{^{32}\,}https://www.edreports.org/reports/detail/mcgraw-hill-illustrative-mathematics-traditional-2021/high-school/gateway-one$

³³ https://www.edreports.org/reports/overview/engage-ny-2016

https://doe.nv.gov/uploadedFiles/nde.doe.nv.gov/content/Standards_Instructional_Support/Nevada_Academic_Stan dards/K-12_ELA_Standards_ADA_Accessible.pdf

https://doe.nv.gov/uploadedFiles/nde.doe.nv.gov/content/Nevada_Academic_Standards/Science/NVSACCSDCIspdf.pdf

disciplines. In the physical science performance expectations at the high school level, there is a focus on several scientific practices. These include developing and using models, planning and conducting investigations, analyzing and interpreting data, using mathematical and computational thinking, and constructing explanations; and to use these practices to demonstrate understanding of the core ideas. Students are also expected to demonstrate understanding of several engineering practices, including design and evaluation.

Curriculum: DBQ Project Alignment to Nevada Academic Content Standards for Social Studies (NACSS)

Rooted Clark County will use the DBQ Project DBQs and MiniQs which are aligned to Common Core (adopted in Nevada in 2010) and the Nevada Academic Content Standards for Social Studies.³⁶ Historical content is embedded in a pedagogy which is now called The DBQ Method that helps students learn to think and write. As a result, the DBQ Project's lessons address most all of the common core standards in reading, writing, speaking and listening, and several standards in language. The DBQ Method helps students read with understanding, think straight, and write clearly about history. Furthermore, the DBQ Project DBQs and MiniQs are a direct compliment to the Nevada Academic Content Standards for Social Studies that will address the following topical areas for Grades 9–12: World History & Geography (1300 – Present), U.S. History (1877–Present), Civics & Economics, and Financial Literacy.³⁷

(4) Explain how the school will identify and differentiate to meet the needs of intellectually gifted students in a way that extends their learning and offers them unique, tailored opportunities. Include information on how staffing will be structured to ensure that gifted students are adequately supported. Please note that Nevada law classifies intellectually gifted students as eligible for specific support services. How will staffing be structured to ensure that gifted students are adequately supported?

While many schools offer extensive services and support for students in need of academic remediation, advanced students are often forgotten due to time or personnel constraints. This effect is particularly pronounced in urban education settings, where a statistically larger proportion of students are below-grade level, therefore absorbing the majority of Response to Intervention (RTI) services. Consequently, districts with the highest percentages of minority and low-income students are the least likely to provide accelerated or gifted programing. Rooted Clark County was worked closely with the Special Education Leadership Fellowship (SELF) program to develop best practices that will address this opportunity gap and change the trajectory for advanced students.

Identification and Monitoring: Rooted Clark County will follow the same guidelines and RTI procedures for advanced students as it does with students in need of remediation. The use of Small Group instruction, pull-out, Session Break enrichment and Industry-Based Credentials and Internships (described earlier in this section) will also be used to create a Personalized Learning Plan for advanced students. Additionally, the practices below will allow even more opportunity for Rooted Clark County's advanced students.

Enrichment Opportunities: Each year, enrichment activities will be identified specifically for advanced students. After-school and summer internships and programs available to these students will be identified by the Director of School Environment and Assistant School Leader.

Broader Choices for Industry-Based Credentials: Once advanced students have completed their required Industry-Based Credentials for the academic year, they will be offered access to required

³⁶ https://www.dbqproject.com/about-us/best-practices/common-core/ 37

https://doe.nv.gov/uploadedFiles/nde.doe.nv.gov/content/Standards_Instructional_Support/Nevada_Academic_Stan dards/Social_Studies/NVACSforSocialStudies.pdf

credentials for the upcoming school year or have options to pursue Industry-Based Credentials that may be of personal interest.

Restorative Practice Training: Advanced students will be trained as Restorative Practice Facilitators by the Director of School Environment. Examples of roles advanced students might have in a conflict includes but is not limited to: peer jurors, peer mentors, circle-keepers. While these practices do not specifically address academics, these programs teach students problem-solving and leadership skills, unique to a Restorative Practice program.

(5) Describe the professional development teachers will receive to ensure high levels of implementation of the instructional model and curriculum.

Rooted Clark County will model its professional development (PD) structure off of Rooted New Orleans' model for responsive team building and individual staff development. PD will be offered to recruit, retain, and develop a high-quality teaching force. Research shows that teachers today are not satisfied with existing PD formats.

System-driven, compliance-based PD is not working for teachers or for students. Instead, teachers describe ideal PD as relevant, interactive, delivered by someone who understands their experience, and sustained over time. At Rooted Clark County, PD will be approached with these ideals in mind. Rooted Clark County will provide a PD program that is driven by the collective and individual needs/preferences of the faculty and geared toward long-term learning to impact student achievement. Rooted teachers will play a larger role in selecting learning experiences that are impactful for them. They will work together with their direct managers to design their own individual learning plans

Like Rooted Clark County students, our teachers will be empowered, self-directed learners. As a result, teachers help drive the PD program including dedicated professional development days as well as learning opportunities embedded in teachers' daily schedules.

Our staff culture is also grounded in the tenets of a Deliberately Developmental Organization (DDO).³⁸ A DDO, as coined by Robert Kegan and Lisa Lahey, is organized around the simple but radical conviction that organizations will best prosper when they are more deeply aligned with people's strongest motive, which is to grow. This means going beyond consigning professional development to high-potential programs, executive coaching, or once-a-year off-site retreats. It means fashioning an organizational culture in which support of people's development is woven into the daily fabric of working life and the company's regular operations, daily routines, and conversations. A commitment to this type of teamwork is the first priority we look for in prospective teammates and nurture it via our teacher and leader evaluation systems.

In planning for various PD opportunities, the School Leadership Team will cross-reference proposed programming with the mission and goals of the school to make sure they are in alignment. Student data and teacher observation trends are reviewed weekly by the School's Leadership Team to inform the PD scope and sequence, while instructional faculty use student data during weekly team meetings to measure progress and refine instructional initiatives. All core components are conducted on-site, although faculty has additional opportunities to attend PD conducted by external partners based on need and/or in alignment with interests (e.g. Deeper Learning Conference).

This ongoing training ensures that all leaders and staff are prepared to serve as advisors and uphold the core Rooted Clark County school design elements mentioned earlier in this section. We hold our faculty and staff accountable to delivering culturally relevant curriculum and practicing attachment-based teaching

³⁸ Anderson, J. (2014). On Deliberately Developmental Organizations. Harvard Graduate School of Education. Retrieved from https://www.gse.harvard.edu/news/14/04/deliberately-developmental-organizations

with students from the first day of school. Just as growth is a culture pillar for our students, it is also expected of our faculty.

Aligned to our mission and values, Rooted Clark County professional development program includes the seven main components, listed below. The seven components spring from our commitment to being a DDO.

Components of Teacher and Faculty PD	Description	Timing & Frequency
Base Camp (Whole School Team)	Text-based team development that introduces the team to Rooted's version of a DDO. Provide team common language for increased alignment	Annually, 2-3 days during the first week of PD in July
The Climb (Whole School Team)	Onboarding the entire team to all aspects of the Rooted School model	Annually, 30 days during July and August
Scorecard Check-ins (Individualized)	Opportunity for coaching and evaluative feedback on individual staff performance and DDO goals	Bi-weekly, 45min – 60min
Team Data Dives (Whole School Team)	Opportunity for the team to analyze and debrief insights from school-wide data Strategize team-wide, content area, and student cohort interventions in response to data	Every Thursday during the school year, 60min
Half Day PD (Whole School Team)	Team receives differentiated and group and individual development based on RS-CC 's strategic focus at a specific point in the school year	Five times throughout the school year, 1p – 4p
Instructional Leadership Team (Attended by staff designated as instructional leaders)	Collect and analyze school-level data Synthesize trends Decide which trends deserve priority within the school's strategic focus	Every Monday, 60min – the weekly data review structure enables the on-going building of staff capacity for data collection, analysis, and use of performance date to improve teaching, learning, and school climate.
Trauma Informed PD (Attended by Whole Village Art Therapy team, School Leader, and Assistant School Leader)	Share trends in types of traumas experienced by Rooted students Share and brainstorm best practices for addressing traumas experiences by students	During The Climb and weekly at Student Support Meetings

Our school recognizes that the teacher in each classroom has the greatest impact on student achievement. In alignment with our mission and values, we leverage high quality talent and training to ensure missionaligned outcomes for our students. Our comprehensive professional development plan includes proven coaching and development models used at existing Rooted Schools. Additionally, the school will ensure all state required and child safety training is addressed during the Trauma Informed PD sessions and regularly reinforced as needed throughout the school year.

The teachers receive coaching and feedback throughout the school year. During the bi-weekly Scorecard Check-ins, teachers receive one on one coaching and feedback about recent units and outcomes. Teachers also use Half Day PD and Scorecard Check-ins to discuss and practice instructional techniques and delivery.

The school leader, with support from the Leadership Team at Rooted School Foundation, develops and implements the PD scope and sequence for the year. The School Leader, Assistant School Leader and Instructional Leadership Team plan and execute PD sessions with development from Rooted School Foundation as needed.

Rooted School Foundation's Leadership Team, as well as the Instructional Leadership Teams across the Rooted School network, has extensive professional development experience to support the implementation of an effective PD plan. The school leader selected to lead Rooted Clark County will also have experience with effective leadership and faculty development. The school leader creates a professional environment in which all faculty can drive their own development aligned with their professional goals. To this end, all faculty members are considered responsible parties in their own development.

To facilitate this process, Rooted Clark County faculty will follow a self-directed learning cycle like the ones students follow:

- Reflect on their individual and collective strengths and weaknesses.
- Set goals (annual, trimester, and weekly) to develop their practice and meet their students' needs.
- Make a plan to efficiently meet these goals within a defined timeline.
- Execute the plan, learning in ways that best match their needs and preferences.
- Demonstrate learned knowledge and skills in their daily work, and by sharing them with their colleagues and peers from partner district and charter schools.

(6) If the proposed charter school intends to include a vocational or career and technical education program, provide a description of the career and technical education program that will be implemented by the charter school.

In line with the Industry-Based Credentials and Internships model design feature, Rooted Clark County will feature a robust career and technical education program that will feature courses across multiple Program Clusters that include but is not limited to: Information Technology, Science Technology, Engineering, and Mathematics, and Manufacturing. While each Program Cluster will feature a different set of courses and Industry-Based Credentials the Employability Skills for Career Readiness Standards (which are closely aligned to MHA Labs Skill Building Blocks that our flagship campus in New Orleans has experience using) will be an integrated component of all CTE course sequences.³⁹ Students will have two years to complete a Program of Study according to the forthcoming updates to Nevada's CTE programming. Each year, we will offer students a chance to earn at least one IBC in a Program of Study. An example of a Program of Study that Rooted Clark County might feature within the Manufacturing Program Cluster is included below.

³⁹ https://doe.nv.gov/CTE/Programs/Employability_Skills_for_Career_Readiness/

			-	Program of S	Study -	
Career Clu	<i>ister:</i> Manuf	acturing				Career Pathway: Production
This Academ		•				ic course names may vary among school districts.
Grade	1 st Course	2 nd Course	3 rd Course	4 th Course	5 th Course	6 th Course (CTE)
9 th Grade	English I	Algebra I	Biology	Health / Computer Literacy	Physical Education	Automation Technology I
0 th Grade	English II	Geometry	Chemistry or Geoscience	World History	Physical Education	Automation Technology II
11 th Grade	English III	Algebra II	Science Course or Elective ¹	US History	Foreign Language ² or Elective ¹	Automation Technology III ³
L2 th Grade	English IV	Senior Level Math	Elective ¹	US Government	Foreign Language ² or Elective ¹	Automation Technology Advanced Studies
Electives may i Foreign Langua	age courses are	humanities cours	a student is planr	ning on entering a	ucation courses that	relate to the program of study. Ividual university admission policies)
Electives may i Foreign Langua CTE Assessmer	age courses are nts will be admi	humanities cours recommended if nistered during th	a student is plann le completion leve	ning on entering a el CTE course.	ucation courses tha university. (See inc	lividual university admission pólicies)
Electives may i Foreign Langua CTE Assessmer	age courses are nts will be admi	humanities cours recommended if nistered during th	a student is plann le completion leve tions Job Experie	ning on entering a	ucation courses tha university. (See inc earning nship / Work / Career Fairs /	lividual university admission policies) CTE Assessments 1) End of Program Technical Assessment for Automation Technology 2) Workplace Readiness Skills Assessment
Electives may i Foreign Langua CTE Assessmer	age courses are nts will be admi echnical Stud	humanities cours recommended if nistered during th	a student is plann le completion leve tions Job Experie	hing on entering a el CTE course. Work-Based Le Shadowing / Inter ence / Career Days	ucation courses tha university. (See inc earning nship / Work / Career Fairs /	lividual university admission policies) CTE Assessments 1) End of Program Technical Assessment for Automation Technology
Electives may i Foreign Langua CTE Assessmen Career and T	age courses are nts will be admi echnical Stud	humanities cours recommended if nistered during th dent Organizat	a student is plann le completion leve tions Job Experie	hing on entering a el CTE course. Work-Based Lo Shadowing / Inter ence / Career Days Field Trips / Guest	ucation courses that university. (See inc earning nship / Work / Career Fairs / Speakers	lividual university admission policies) CTE Assessments 1) End of Program Technical Assessment for Automation Technology 2) Workplace Readiness Skills Assessment
Electives may i Foreign Langua CTE Assessmen areer and T Postsec College of South College / Nevad Nevada, La	age courses are nts will be admi echnical Stud SkillsUSA	humanities cours recommended if nistered during th dent Organizat nistered Basin / Truckee University ersity of at College	a student is plann e completion leve tions Job Experie condary Program	hing on entering a el CTE course. Work-Based Lo Shadowing / Inter ence / Career Days Field Trips / Guest State Articula m Requirements the state Certifica edit Options n Nevada TBE	cucation courses that university. (See inc earning nship / Work / Career Fairs / Speakers ation Agreemen te of Skill Attainme	lividual university admission policies) CTE Assessments 1) End of Program Technical Assessment for Automation Technology 2) Workplace Readiness Skills Assessment (for Employability Skills Standards)

PROGRAMS OF DISTANCE EDUCATION (Distance Education Applicants Only)

A charter school that wishes to provide distance education (online, virtual, cyber, etc.) courses and/or programs (NRS 388.820-388.874 and NAC 388.800-388.860) must submit a distance education application to the Nevada Department of Education prior to or in conjunction with its application to the SPCSA. For applicants who do not propose to offer a program of distance education, please provide a brief statement explaining that the questions in this section are not applicable.

- (1) Describe the system of course credits that the school will use.
- (2) Describe how the school will monitor and verify the participation in and completion of courses by pupils. Please include an explanation as to how the proposed school will document and monitor student attendance to ensure meaningful participation in courses.
- (3) Describe how the school will ensure students participate in assessments and submit coursework.
- (4) Describe how the school will conduct parent-teacher conferences.
- (5) Describe how the school will administer all tests, examinations or assessments required by state or federal law or integral to the performance goals of the charter school in a proctored setting.
- (6) Describe the support that will be available to each pupil, in his or her home or community, including the availability and frequency of interactions between the pupil and teachers.
- (7) Describe the criteria pupils must meet to be eligible for enrollment at the proposed charter school for distance education and the process for accepting pupils.

This prompt is not applicable because Rooted School–Clark County is not a Distance Education program.

PRE-KINDERGARTEN PROGRAMS (Proposals Including Pre-K Only)

A charter school that wishes to provide pre-kindergarten services to students who will later enroll in its K-12 programs must apply separately to the Nevada Department of Education to offer education below the kindergarten level following charter approval. Approval to offer pre-kindergarten cannot be guaranteed. Consequently, revenues and expenditures related to pre-kindergarten should not be included in the initial charter application budget. Please note that state-funded pre-kindergarten programs are not directed through the state Distributive Schools Account for K-12 education. In addition to a limited amount of state pre-kindergarten funding available through the Department of Education, the SPCSA is also a sub-recipient of a federal grant to expand early childhood services in certain high-need communities through programs approved by NDE. Applicants are encouraged to review resources available at

http://www.doe.nv.gov/Early_Learning_Development/. For applicants who do not propose to offer prekindergarten, please provide a brief statement explaining that the questions in this section are not applicable.

- (1) Identify whether the school plans to offer pre-kindergarten in the first year of operation or any subsequent year of the charter term.
- (2) Identify whether the school will offer fee-based pre-kindergarten services. If the school does plan to offer fee-based pre-kindergarten, explain how the school will ensure that parents will be informed both initially and on an ongoing basis that both state and federal law preclude a K-12 charter school from giving admissions preference to students to whom it has previously charged tuition.
- (3) Describe the school's plans for ensuring that the pre-kindergarten program aligns with the mission, vision, and program of the school's other grades and meets all other state requirements.
- (4) Explain how the school's proposed pre-kindergarten program may meet the federal prekindergarten expansion grant criteria.

This prompt is not applicable because Rooted School-Clark County is a high school.

PROMOTION AND HIGH SCHOOL GRADUATION REQUIREMENTS

QUESTIONS 1 AND 4 ARE REQUEIRED OF ALL APPLICANTS, EVEN THOSE NOT PROPOSING TO OFFER A HIGH SCHOOL PROGRAM.

Please note that high schools approved by the SPCSA will be required to meet or exceed Nevada graduation requirements.

(1) Explain how students will matriculate through the school (i.e., promotion/retention policies) and how stakeholders will be informed of these standards.

Rooted Clark County will have a matriculation plan that is articulated in the Family Handbook that incoming students and parents receive. The academic model, interventions that will be put into play, and other policies around and other policies around promotion/retention will not only be discussed at-length with parents and teachers during the summer before the start of the next school year, but they will also be posted in the staff handbook, student handbook, and spoken about at each parent/teacher conference throughout the year. Historical data around low-income/FRL students in Clark County show that remediation will be needed for many students. Some Cactus Park students may not be able to progress to the next grade with extensive truancies, multiple grades below grade-level, etc. It is for this reason that we

will enact the following models for promotion and retention. The following data will be considered in the promotion and possible retention of our students:

- Weekly grades/formative assessment scores (provided through School Runner)
- Progress Reports/Report Cards
- School-wide assessment scores (Badge Assessments, Achieve3000 progress monitoring assessments, NV state tests)
- Attendance Records
- RTI Tier movement/record of interventions
- Behavior reports (provided through School Runner)

Students will be flagged at the end of Session 1 (first 4-5 weeks of school) each year for deeper interventions and social-emotional supports to avoid retention based the following criteria:

- Average of less than 75% proficiency in both Reading and Math on Q1/Q2 Progress Reports; and/or
- > 3 years behind grade level in Reading or Math; and/or
- More than 5 absences per quarter

These students who are flagged will receive a mix of the following interventions and/or social emotional supports from their teachers, MTSS team, and other specialists to better their chances at promotion and avoid retention:

- Additional scaffolded interventions in-class
- Additional Small Group instruction and/or pull outs
- Outside tutoring services
- SEL supports provided from our Director of School Environment
- Identity conversations around home-life and school improvement (usually provided by a licensed art therapist that Rooted contracts with)

If these interventions are still not providing improvement or results, students that are identified for possible retention mid-year, will receive a formal letter from the school. In addition, a meeting will be scheduled with the student's parent/guardian and the school administration to discuss possible retention and develop a plan for partnered intervention.

(2) For schools proposing a high school program, explain how the school will meet state graduation requirements. Describe how students will earn credit hours, how grade-point averages will be calculated, what information will be on transcripts, and what elective courses will be offered. If graduation requirements for the school will exceed those required by the State of Nevada, explain the additional requirements.

Until revised, Rooted Clark County students will be held accountable to the Nevada Department of Education's 2021-2023 College and Career Ready Credit & Assessment Requirements to graduate from high school.⁴⁰ Units of credit generally comprise one year of coursework and require at least 120 hours of instruction. Students will be provided access to coursework that will enable to obtain a Standard Diploma according to Nevada state law and Advanced Diploma or College and Career Ready Diploma.

The following scale will be used to translate course passage scores to letter grades and GPAs:

⁴⁰

 $https://doe.nv.gov/uploadedFiles/ndedoenvgov/content/High_School_Graduation/CCR_Credit_Assess_Requirements .pdf$

GPA	Letter Grade	Course Passage Scores
3.75-4.00	A+	97+%
3.26-3.74	А	93-96%
3.00-3.25	A-	90-92%
2.84-2.99	B+	87-89%
2.67-2.83	В	83-86%
2.50-2.66	B-	80-82%
2.34-2.49	C+	77-79%
2.17-2.33	С	73-76%
2.00-2.16	C-	70-72%
1.76-1.99	D+	67-69%
1.26-1.75	D	63-66%
1.00-1.25	D-	51-62%
Below 1.00	F	0-50%

Rooted Clark County transcripts will include, but is no limited to, the information below:

- Student Name
- Student ID
- Student Grade
- Student Gender
- Student Date of Birth
- Student Address
- Courses taken each year at Rooted School
- Grades for courses taken each year at Rooted School
- GPA scale
- Definition of terms and abbreviations
- GPA Summary
- Graduation Date
- Signature from school official and date of signature
- School seal

Rooted Clark County elective courses will be aligned to Programs of Study within Program Clusters that include but is not limited to: Information Technology, Science Technology, Engineering, and Mathematics, and Manufacturing. Some examples of elective courses and their relevant IBCs is included below:

Sample Program Cluster	Sample Program of Study	Sample Course Progression	Sample IBC	Sample Entry- Level Roles
Information Technology	Cybersecurity	 Cybersecurity I Cybersecurity II Cybersecurity III Cybersecurity Advanced Studies 	CompTIA A+ CompTIA Network+ CompTIA Security+	Entry Level Mechatronics Technician Compensates above the regional living wage
Science, Technology, Engineering, and Mathematics	Energy Technologies	 Energy Technologies I Energy Technologies II Technologies III 	N/A	Entry Level Sales Representative for Clean Energy Project

		- Energy Technologies Advanced Studies		Compensates above the regional living wage
Manufacturing	Automation Technology	 Automation Technology I Automation technology II Automation Technology II Automation Technology III Automation Technology III Automation Technology Advanced Studies 	Siemens Mechatonics Level I and Level II	Automation Technician Compensates above the regional living wage

(3) For schools proposing a high school program, explain how the graduation requirements will ensure student readiness for college or other postsecondary opportunities (e.g., trade school, military service, or entering the workforce).

Addressed in response #2 above.

(4) Explain what systems and structures the school will implement for students at risk for retention and/or dropping out and/or not meeting the proposed graduation requirements, including plans to address students who are overage for the grade level. For high schools, describe your plans to support students needing to access credit recovery options.

Response included above in question (1).

DUAL-CREDIT PARTNERSHIPS (Required for all High School Applicants)

High schools approved by the SPCSA are required to enter into cooperative agreements with one or more community colleges, state colleges and universities to offer dual credit courses per NRS 389.310. Any applicant proposing a high school program is required to complete this section. For applicants who do not propose to operate a high school program, please provide a brief statement explaining that the questions in this section are not applicable.

(1) Discuss the scope of the services and resources that will be provided by the college or university.

The scope of the services and resources is described at-length in the MOU included within Attachment 2.

(2) Describe the proposed terms of the relationship between the charter school and the college or university including

(a) proposed duration of the relationship and the conditions for renewal and termination

The term of the MOU will be August 1, 2023, through July 31, 2028. By July 1, 2028, the two parties may agree to extend the Term for five (5) additional years through July 31, 2033. Each party may terminate the MOU without cause with thirty (30) days written notice to the other party, and any Rooted student will be able to complete the course(s) they are enrolled in according to this MOU at the time of the written notice.

(b) the manner and amount that the college or university will be compensated for providing such services and resources, including, without limitation, any tuition and fees that pupils at the charter school will pay to the college or university

Currently, Rooted Clark County is responsible to pay for all fees applicable to Rooted Clark County students enrolled at CSN. CSN will charge Rooted through an invoice within thirty (30) days of the start of the courses and Rooted will remit payment of fees within (30) days receipt of CSN's invoice, for each student enrolled in CSN courses pursuant to Section II in the MOU attached. Rooted may pursue grants and other funding opportunities to help support their students in the dual enrollment program.

(3) Describe the manner in which the college or university will ensure that the charter school can effectively monitor pupil enrollment and attendance and the acquisition of college credits.

As stated in the attached MOU, selection of the Rooted Clark County high school students that will be able to enroll in CSN dual enrollment study courses pursuant to the terms of the MOU is exclusively reserved to Rooted Clark County and must be approved by CSN. Both parties will coordinate to verify that selected students qualify for admission and enrollment pursuant to the terms of the MOU and applicable Nevada System of Higher Education (NSHE) standards. Each first-time Rooted high school student must complete the CSN on-line admission form. The completeness and accuracy of the admissions form is the responsibility of the student.

(4) Identify any employees of the college or university who will serve on the governing body of the charter school.

Currently, no employees of the College of Southern Nevada have been identified to serve on the governing body of Rooted Clark County.

(5) Provide as Attachment 2, a draft memorandum of understanding between the charter school and the college or university through which the credits will be earned and a term sheet confirming the commitment of both entities to the specific terms outlined in this charter application. If the school is not planning to provide a dual-credit program, please upload an attestation explaining that this request is inapplicable.

The draft MOU with College of Southern Nevada in Attachment 2.

DRIVING FOR RESULTS

The SPCSA will evaluate the performance of every charter school annually, and for renewal, replication, and replacement (restart or reconstitution) purposes according to a set of academic, financial, and organizational performance standards that will be incorporated into the charter agreement and measured by the SPCSA Charter School Performance Framework, the Nevada School Performance Framework adopted by the Nevada Department of Education, and applicable law and regulation. The academic performance standards consider status, growth, and comparative performance based on federal, state, and school-specific measures. The financial performance standards are based on standard accounting and industry standards for sound financial operation. The organizational performance standards are based primarily on compliance with legal obligations and state law and regulation and SPCSA policies, including fulfillment of the governing board's fiduciary obligations related to sound governance.

Applicants are expected to propose additional mission-specific goals to complement or supplement, but not supplant, the SPCSA's performance standards with school-specific, mission-driven academic, financial, or organizational goals. All such indicators, measures, and metrics are expected to be rigorous, valid, and reliable.

(1) Describe the mission-specific academic goals and targets that the school will have. State goals clearly in terms of the measures or assessments you plan to use and describe the process by which you will determine and set targets.

Academic Goal 1: >70% of our students will obtain at least (1) Industry-Based Credential offered annually.

Assessment Tools: By the end of each school year, Rooted students are expected take a summative assessment for at least one Industry-Based Credential that is offered through a course they enrolled in that school year. This assessment is facilitated through an elective CTE course within a Program of Study. Examples of assessment tools include, but are not limited to, Certiport and the Unity Certified Associate Exam.

Rationale for Goal and Measure: It is the mission of Rooted School to rapidly reduce America's wealth gap by connecting underserved and talented teenagers with career and financial pathways. Holding ourselves accountable to this statement is of the highest priority and failing to meet our targets will require thorough self-reflection and analysis of our methods. Just as we assess students' proficiency in Math and ELA each year, the degree to which we are training and certifying students in credentials that could lead to familysustaining jobs must be monitored and evaluated. IBCs and CTE are also a High School Performance Indicator according to the Nevada Department of Education.

Assessment Reliability and Scoring Consistency: Assessment tools like Certiport and Unity Certified Associate Exam are industry-standard tools and are the only certifying mechanisms for the IBCs they feature (i.e Autodesk Inventor, Unity Game Engine, etc.).

Baseline Data: Because of the nature of the IBC exams and expense, we do not capture baseline data on student performance.

Academic Goal 2: Average ACT practice score for Grade 9 students is 18; Average ACT practice score for Grade 10 students is 19; Average ACT score for Grade 11 and 12 students is 21.

Assessment Tools: By the end of each school year, Rooted students are expected take a summative assessment for at least one Industry-Based Credential that is offered through a course they enrolled in that school year. This assessment is facilitated through an elective CTE course within a Program of Study. Examples of assessment tools include, but are not limited to, Certiport and the Unity Certified Associate Exam.

Rationale for Goal and Measure: It is the mission of Rooted School to rapidly reduce America's wealth gap by connecting underserved and talented teenagers with career and financial pathways. Holding ourselves accountable to this statement is of the highest priority and failing to meet our targets will require thorough self-reflection and analysis of our methods. Just as we assess students' ability to earn IBCs each year, the degree to which they are also on track to meet college entrance exam requirements must be monitored and evaluated. The ACT is also a High School Performance Indicator according to the Nevada Department of Education.

Assessment Reliability and Scoring Consistency: Students should complete the official ACT practice test.⁴¹ Official tests are the best resource to use for getting a student's baseline score.

Baseline Data: Along with the other baseline assessments students complete when they enroll at Rooted School, they will complete an ACT practice test. A sample plan we will use to determine how many hours our students need to study is (a) Subtract a student's baseline score from their goal score; (b) match the difference to a point range below to understand how many total hours a student will need to study:

- 0-1 point improvement: 10 hours
- 1-2 point improvement: 20 hours

⁴¹ https://blog.prepscholar.com/complete-official-act-practice-tests-free-links

- 2-4 point improvement: 40 hours
- 4-6 point improvement: 80 hours
- 6-9 point improvement: 150 hours+⁴²

Non-Academic Goal 1: >80% satisfaction rate from our quarterly student and teacher satisfaction survey.

Assessment Tools: At the end of each quarter, students and teachers will take the Teacher-Student Rapport survey through Google Forms. This survey will assess students' and teachers' satisfaction with each other as well as their perceptions of the success of Rooted Clark County's academic model.

Rationale for Goal and Measure: Hospitality (defined as "we put people first") is one of Rooted's core values and the degree to which we are creating a hospitable environment for students and teachers to successfully partner is directly connected to broader goals we have for student/staff retention and student matriculation.

Assessment Reliability and Scoring Consistency: All staff will analyze the results from these surveys during Session Breaks. Results from these surveys will also be cross-referenced with qualitative observations from throughout the session completed by the School Leader, Director of School Environment, and Instructional Leadership Team. Outlying students and teacher data will be investigated by the Director of School Environment to address and understand discrepancies.

Baseline Data: A Students and teachers will take a similar satisfaction survey at the beginning of our first school year, however, this assessment will be aimed at their experiences at previous schools and workplaces.

(2) In the table below, outline the clearly measurable annual performance and growth goals that the school will set in order to meet or exceed SPCSA expectations as outlined in the SPCSA Academic Performance Framework indicators and to meet state expectations for student academic growth in accordance with the Nevada School Performance Framework (NSPF) adopted by the Nevada Department of Education. You may add or delete rows as needed. Also:

- (a) Describe your presumed baseline and explain how it was set.
- (b) Articulate how the organization will measure and evaluate academic progress of individual students, student cohorts, sub-groups, campuses (for invited multi-site applicants), and the entire school throughout the school year, at the end of the academic year, and for the first three years of operation.

Goal	Aligned to SPCSA Framework, NSPF or Both?	Evaluation Tool and Frequency	Baseline	2023-24	2024-25	2025-26
Reading	Both	Lexile growth (Achieve3000): 3 times/year Annual Nevada End-of- Course	Baseline goals are set using the Lexile grade level equivalenc y scale	Baseline + 3-5%; specific goals TBD by 9/1/23	2023 + 3- 5%; specific goals TBD by 9/1/24	2024 + 3- 5%; specific goals TBD by 9/1/25
		Assessments	Students	Students will earn, on	Students will earn,	Students will earn,

⁴² https://blog.prepscholar.com/act-study-plan

		Explore/Plan/A CT: 3 times per year	will earn, on average, a reading score of 18; students will make an average of 2 points of growth	average, a reading score of 19; students will make an average of 2 points of growth	on average, a reading score of 20; students will make an average of 2 points of growth	on average, a reading score of 21; students will make an average of 2 points of growth
ELA % proficiency - - All Students and each statistically significant subgroup	Both	Annual Nevada End-of- Course Assessments	See above	See above	See above	See above
Math % proficiency - - All Students and each statistically significant subgroup	Both	Annual Nevada End-of- Course Assessments	TBD by August 2023 based on enrolled 9th - 10th graders' prior test scores (where available)	Baseline + 3-5%; specific goals TBD by 9/1/23	2023 + 3- 5%; specific goals TBD by 9/1/24	2024 + 3- 5%; specific goals TBD by 9/1/25
Math growth	Both	Explore/Plan/A CT: 3 times per year	Students will earn on average, a mathemati cs score of 18; students will make an average of 2 points of growth	Students will earn on average, a mathematic s score of 19; students will make an average of 2 points of growth	Students will earn on average, a mathematic s score of 20; students will make an average of 2 points of growth	Students will earn on average, a mathemati cs score of 21; students will make an average of 2 points of growth
Science % proficiency - All students and each statistically	Both	Annual Nevada End-of- Course Assessments Explore/Plan/A	Students will earn on average, a science score of	Students will earn on average, a science score of 19; students	Students will earn on average, a science score of 20; students	Students will earn on average, a science score of

significant subgroup		CT: 3 times per year	18; students will make an average	will make an average of 2 points of growth	will make an average of 2 points of growth	21; students will make an average
			of 2 points of growth			of 2 points of growth
Industry- Based Credentials	Both	Varies per credential, once per year (by end-of-year)	N/A	An average of 70% of students will earn an Industry- Based Credential	An average of 70% of students will earn an Industry- Based Credential	An average of 70% of students will earn an Industry- Based Credential
Graduation Rate	Both	End of year credit attainment analysis	Clark County graduatio n Rate (2020): 83.2%	>85% of students will be on track for graduation	>85% of students will be on track for graduation	>85% of students will be on track for graduation

(3) In addition to mandatory state testing, identify the primary interim academic assessments the school will use to assess student-learning needs and ensure progress towards SPCSA and state proficiency targets and describe how they will be used.

To constantly monitor the efficacy of Rooted Clark County's instructional program, we will make use of diagnostic/benchmark, formative, and summative assessments. These assessments will be a combination of standardized and teacher-created material. Diagnostic/Benchmark Assessments–Rooted Clark County's teachers will utilize diagnostic assessments at the start of the school year to accurately assess students' current levels. These same assessments will also serve as benchmark data throughout the year to monitor and update Rooted Clark County teachers on their student growth. Data will be used to identify students' prior knowledge, create leveled Small Groups for interventions, and determine appropriate individualized goals for every student.

Assessment	Description	Used By
Achieve3000	Achieve3000's Diagnostic is	Students in grades 9–12
	designed to assess students'	
	independent reading level in	
	regard to comprehension,	
	fluency, letter names, phonics,	
	word analysis, vocabulary, and	
	writing. In this assessment,	
	students will read books which	
	follow a specific gradient of	
	difficulty until the student's	
	Lexile level is identified. This	
	assessment was selected for	
	teachers to identify students'	
	unique literacy needs and	
	create Personalized Learning	

	Plans	
IXL Math	IXL's Diagnostic is a flexible tool that reveals exactly what students know and helps instructional leaders take actionable steps to foster growth at every performance level.	Students in grades 9–12
WIDA Access	The WIDA ACCESS is an assessment used to track English language proficiency of students grades K-12. Administered at the beginning of the school year and periodically throughout the school year, this assessment will help to identify and track the progress of our English Learners (ELs).	Grade 9 and newly enrolled students in grades 10–12. ELL teachers and aides.

(4) How will you support teachers in developing embedded assessments and checks for understanding in order to ensure that instruction meets student needs?

Formative Assessments: Formative assessments are used regularly throughout the year to assess students' mastery of grade-level standards and for data-based decision-making in regard to curriculum pacing. Rooted Clark County teachers will utilize formative assessments to adjust the rigor and type of learning activities throughout each lesson and unit. These assessments are both provided through the chosen aforementioned curriculum as well as created through in-house assessment creation days during summer PD. Furthermore, by aligning formative assessments to Common Core and Nevada Academic Content standards, students will prepare for questions and content they will encounter on the Achieve3000, IXL, Badge Assessments, and state-wide assessments which contribute to Rooted Clark County's end-of-year rating.

Assessment	Description	Used By
Daily Exit Tickets	Teachers will use exit tickets daily in each	All Students
	class to assess students' mastery of the	
	content taught that day. These exit tickets	All Teachers
	can range dramatically in format and	
	content depending on the standard being	
	assessed. Teachers will create exit tickets	
	independently or utilize questions pulled	
	from ELA and Math curriculum. Teachers	
	will utilize data from these exit tickets to	
	determine student mastery and plan for	
	future lessons (i.e. proceed in lesson, re-	
	teach, small group)	
Badge Assessments	Assessment blocks built into the schedule	All Students
	will be utilized to assess students on	
	content taught throughout course units.	All Teachers
	These unit assessments, also known as	

	Badge Assessments internally, will be teacher generated. Teachers will use data from these assessments in a similar manner to exit tickets in order to inform instruction for the week(s) ahead. Longitudinal analysis of data from these assessments can also be used to identify students in need of academic RTI interventions.	
Curriculum- Embedded Assessments	Students will regularly engage with assessments through our online platforms in ELA, Math, and other content areas during Small Group instruction. These assessments help to monitor student progress through the online programs, ensuring that students are being challenged at their current achievement level. Teachers will check in with student progress through these programs and administrators can analyze year-long data from these assessments to make decisions about technology programs used in the future.	All Students All Teachers

Analysis of these formative assessments will take place through the implementation of weekly Data Dives, in which teachers and administrators will meet to review aggregated data and student work samples to identify misconceptions and direct future instruction.

(a) Explain how you will know that your proposed interim assessments are valid and reliable indicators of progress. Explain how these interim assessments align with the school's curriculum, performance goals for the school and the SPCSA, and state standards.

Our proposed interim assessments, which will be facilitated through Achieve3000 and IXL are all aligned to Common Core State Standards (adopted by Nevada in 2010). These assessments will be given three times throughout a school year to measure student achievement and growth in various subject areas.

Scores: These tests are used for a variety of instructional purposes. First, they offer an initial screening to get a general sense of a student's performance. The Achieve3000 and IXL platforms then offers progress monitoring tools and tools used to measure growth and proficiency. They also assess skills mastery and provide teachers with research-based interventions to target specific skills or learning gaps.

Usage: The following are primary instructional methods we use to create an equitable, student-centered, and differentiated learning environment that is responsive to the data we gather from interim assessments.

Instructional Method	Usage	Responsive Principles
Flexible Blended Learning	Used in seven daily SDL blocks. Students	Multiple means of
	rotate through adaptive online programs,	engagement
Learning	working on grade-level standards-aligned	Multiple means of

	playlists to complete formative badge	representation
	assessments and receive small group or 1:1	
	tutoring.	Multiple means of action
		and expression
	Flexible groups are created with 2 or more	Multiple means of
	students of similar aptitude and skillsets. This	representation
	structure allows for more targeted	
	differentiation and intervention—either to	Multiple means of action
	close learning gaps or propel students ahead.	and expression
Small Group		
Instruction	It takes place during daily SDL blocks. SGI	
	strategies include mini-lessons, pre-teaching,	
	literacy and numeracy fluency practice, close	
	reading and annotating, writing conferences, small group discussion, and using alternate,	
	high interest grade-level texts.	
	Students acquire IBCs while also applying new	Multiple means of
	thinking across disciplines through an inquiry	engagement
	process in elective SDL blocks.	
	Students apply their skills to address	Multiple means of
	community challenges relevant to them, while	representation
Project-Based	teachers use 1:1	
Learning	check-ins, observation notes, and formative	Multiple means of action
Learning	assessments to support their progress.	and expression
	PBL is used as a summative vehicle for	
	assessing the application and synthesis of student learning on standards-aligned,	
	performance-based assessments and students	
	publicly present their work twice annually.	
	publicly present then work twice annually.	

(b) Describe the corrective actions the school will take if it falls short of student academic achievement expectations or goals at the school-wide and classroom level. Explain what would trigger such corrective actions and who would be responsible for implementing them.

Rooted Clark County recognizes all rigorous professional development must be paired with intensive coaching and observation cycles to ensure the growth of student learning. In order to address the effectiveness of our PD program and the needs of our teachers, Rooted Clark County will employ regular observations and coaching opportunities for teachers. Teachers will receive, at minimum, one weekly informal observation or walk-through from the School Leader, Assistant School Leader, or Director of School Environment focusing on instructional strategies and pedagogy or classroom climate respectively. The observer will then meet briefly with the teacher later in the day to discuss the observation, identify areas for growth, and create a goal for their next observation. These observations may at times focus on recently taught strategies from Friday professional development.

In addition, school leaders (administrators, lead teachers, coaches) will participate in live coaching during informal classroom drop-ins and observations. In this practice, used by other high performing schools across the country and the RELAY Graduate School of Education, observers will correct and coach strategies and pedagogies in the moment, or immediately after the observation. It is Rooted's philosophy

that this immediate and direct feedback will allow teachers to identify issues and adjust instruction more quickly, leading to greater student outcomes.

Rooted Clark County will use observations and feedback collected from multiple observers to identify teachers in need of more intensive and direct coaching. Through collaboration with school administrators, these teachers will create deliberate growth plans and goals related to their deficiencies in academic instruction and/or classroom climate. Depending on need, the Director of School Environment, Assistant School Leader or both will routinely observe the teacher, coach specific strategies, recommend resources and monitor the teacher's progress. Teachers will also have the opportunity to learn from each other by utilizing time during prep blocks to observe other classes. These observations may be used for struggling teachers to witness master teachers in action and note their strategies. Conversely, lead teachers can observe other members of their team to provide coaching and support from the perspective of someone that is teaching the same students. Other effective strategies to address drops in student learning include the following:

- School visits to see other high-performing schools and teachers in action
- Collaborating with a grade-level partner who has successfully improved their instruction
- Improvement plans specific to a practice or skill gap

(c) Articulate how interim assessments will be used to inform instruction. How will teachers and school leaders be trained in their use?

See responses in sections (a) and (b) above, specifically Usage in (a)

(d) Identify specific interim assessments and quarterly performance goals that you will use to confirm that the school is on-track to meet ambitious academic goals throughout the school's first year with students. You may add or delete rows as needed.

Goal	Assessment	Quarter 1 Goal	Quarter 2 Goal	Quarter 3 Goal	Quarter 4 Goal
75% of our students will achieve or exceed growth	Achieve300	Baseline for student growth goal	N/A	>55% of students achieving or	>75% of scholars achieving or
during the Spring in Reading on Achieve3000	0	determined		exceeding growth goals.	exceeding growth goals.
85% of our students will demonstrate proficiency on Interim Assessments in Reading	Interim Assessments	>85% average proficiency	>85% average proficiency	>85% average proficiency	>85% average proficiency
75% of our students will achieve or exceed growth during the	IXL	Baseline for student growth goal determined	N/A	>55% of scholars achieving or exceeding growth	>75% of scholars achieving or exceeding growth

Spring in Mathematics on IXL				goals.	goals.
85% of our students will demonstrate proficiency on Interim Assessments in Mathematics	Interim Assessments	>85% average proficiency	>85% average proficiency	>85% average proficiency	>85% average proficiency

(5) Describe the process for collecting and storing data, including the information system(s) used in addition to the statewide Infinite Campus system.

Please see the combined response below.

(6) How will the school monitor for disparities in academic performance between student groups? What actions with the school take to address identified disparities?

AT-RISK STUDENTS AND SPECIAL POPULATIONS

Pursuant to State and federal law, SPCSA schools are required to serve the needs of all students in special populations. The SPCSA operates under the following principles with regards to special populations of students:

- 1. SPCSA schools serve all eligible students. SPCSA schools do not deny the enrollment of any student based on needs or disability.
- 2. SPCSA schools are to ensure streamlined access for all students requiring special programs.
- 3. SPCSA schools develop programs to support the needs of their students.
- 4. SPCSA schools do not counsel or kick any students out.
- 5. SPCSA schools utilize best practices to expose students to the most inclusive environments appropriate.
- 6. If necessary, an SPCSA school is responsible for developing more restrictive placements to meet the needs of the highest need students, including but not limited to clustered placements in consortium with other charter schools.
- 7. SPCSA schools are responsible for providing high functioning, trained special education teams, which focus on student advocacy and high expectations. IEP teams (including school's leadership) make placement decisions at IEP meetings. Decisions are made based on evidence/data to support what is best for the student.

At-Risk Students & Special Populations

(1) How do you define "at-risk" students? What are the methods for identifying at-risk students through academic and behavioral processes?

See response (2) below

(2) Describe how you will identify the needs of all students. Identify the research-based programs, strategies and supports you will utilize to provide a broad continuum of services, ensure students' access to the general education curriculum in the least restrictive environment.

Rooted Clark County recognizes that all students will not excel equally in the general education classroom. As such, identifying, monitoring and intervening for at-risk students that need additional academic supports will be an important task to be shared among teachers and staff. The primary system for identifying and monitoring at-risk students' social and emotional and academic needs will be the Multi-Tiered System of Supports (MTSS), which is the practice of providing high-quality instruction and interventions matched to student need, monitoring progress frequently to make decisions about changes in instruction or goals, and applying child response data to important educational decisions.

Under the umbrella of MTSS, Response to Intervention (RTI) and Positive Behavior Intervention and Support (PBIS) systems will be used for students with academic and emotional needs respectively. In both systems, the student population is broken into three tiers:

- **Tier 1:** These students represent the general population (roughly 80% of students), whose needs, academic and emotional, are met by the practices and supports in the classroom.
- **Tier 2:** Demonstrating at-risk capacity in academic or behavior, these students are identified and provided with moderate supports to better access the standard classroom environment. About 10-15% of students in a given school will fall into this tier.
- **Tier 3:** Requiring significant supports to participate in the general education curriculum, Tier 3 students make up about 5% of a given school. These students are often those who already require, or may be recommend for Special Education supports.

** The 80/15/5 ratio is regularly used across various charter schools in the nation serving similar demographics.

While many schools in lower-income areas will be quick to up the percentages of students in tiers 2 and 3, the actual reality is that further disaggregation of data (test scores, assignments, etc) needs to be done to ensure that scaffolding can be done in Tier 1 with wraparound services to prevent turning the MTSS pyramid "upside down". Over-identification of students who are "behind" leads to undue burdens on specialized student populations and on specialist/interventionists. While we will drive to keep the bulk of students in classrooms with a scaffolded lesson to meet their needs in Tier I, Tier 2, and Tier 3 percentages may exceed the aforementioned percentages. However, according to educational researchers at Harvard's Graduate School of Education and as mentioned earlier in this section regarding teacher scaffolding and curriculum internalization, MTSS calls for creating and implementing a curriculum from the outset that provides:

- Multiple means of engagement to tap into learners' interests, challenge them appropriately, and motivate them to learn,
- Multiple means of representation to give learners various ways of acquiring information and knowledge, and,
- Multiple means of expression to provide learners with options for demonstrating knowledge and skills.

(3) Describe the school's approach to help remediate students' academic underperformance. Detail the identification strategy, interventions, and remediation to be implemented. Cite the research/rationale for the chosen methods. How will you measure the success of your academic remediation efforts (in year 1, year 3, year 5, and beyond?)

See response (4) below.

(4) Describe your Response to Intervention model in detail, including the interventions and the anticipated proportion of the student body served at each tier level. Please provide the rationale used in this approximation.

The RTI process is a tool used to maximize student learning, reduce behavior challenges, and at times, a referral tool for special education services. Crucial to a high-quality RTI program is data-based decision making, progress monitoring, and appropriate screening.

- Data Based Decision Making: During routine grade-level meetings, teachers and aides will discuss the progress and interventions of all students receiving Tier 2 and 3 services. Data and evidence-based artifacts will drive the discussion to ensure that teachers are using RTI best practices. During this time, the grade-level team will analyze if specific students should be removed or added to Tier 2 or 3.
- Progress Monitoring: Student academic progress is monitored at all levels at all times. Data collected for progress monitoring will be obtained through student formative assessment grades, summative testing scores, instructional technology programs, and attendance records.
- Screening: Incoming students will be assessed using IXL for math and Achieve3000 for reading.

Overseeing the implementation of MTSS and monitoring the addition of students will be our RTI committee, which includes the Assistant Principal/Principal as well as classroom teachers, special education teachers, and teacher aides that work directly with the students in question (for students with social-emotional/behavioral needs, a similar PBIS committee, headed by the Dean of Culture will be formed). Once students have been identified for RTI, the RTI committee will notify parents/guardians of the student of concern, work alongside family solutions, and develop academic and/or behavioral goals for each student. Parent University will also be a time and space for parents/guardians to better understand the RTI process and the indicators for such intervention. These goals will include growth and attainment on formative and summative assessments, improved and positive behavior patterns (for social-emotional/behavior plans), as well as overall academic performance and participation in class. After goals have been established for students, the RTI committee will develop a plan which utilizes practices described in the table below.

(5) How will you communicate the need for remediation to parents?

See response (4) above.

(6) What interventions will be offered for students exhibiting early signs of behavioral concerns and/or need for social emotional supports? How will individual plans for students be implemented and monitored?

In addition to Rooted Clark County's key educational program elements: Self-Directed Learning, Project-Based Learning and Industry-Based Credential acquisition, the school will offer 360° wrap-around student support services, that are designed to meet the needs of the whole student. These include, but are not limited to:

- **Multi-tiered system of supports (MTSS)** is a tiered framework of interventions for students who need additional academic, behavioral, and social-emotional supports.
- **360° Student Support Team (SST)** which is core to our school culture and student discipline model. This is a wrap-around approach that emphasizes building secure attachments, restorative practices and improving overall mental health. The SST reviews academic and behavioral data, makes referrals and strategizes and monitors supports for students in need of Tier 3 interventions. This team is personalized to the specific students being supported and is comprised of the school leader, the director of student services and the advisor or a content teacher of the student in question.
- Weekly Data Dive Meetings are where school-wide data is analyzed and goals are set by the entire instructional team for increased student supports. The school leader, director of CTE and teaching staff come together in these meetings to review course completion, badge assessment, and adaptive intervention program data, along with culture and climate data. This team may make a referral to the SST if student-level data shows that there is need for further intervention.
- **Restorative practices** which anchor the RS-CC graduated discipline policy and are proven to create an environment of inclusion, belonging and a sense of autonomy for "at-risk" students

- Whole Village Art Therapy (or similar therapeutic counseling program) provides access for all students (at least one session a week) with a certified therapeutic counselor to address long-term social-emotional counseling interventions. Art therapy has been shown to have a statistically significant positive effect on students in a number of studies by the National Center for Biotechnology Information. Art therapy will not be provided without parent consent.
- Secure Attachments Training and professional development for staff based on Louis Cozolino's research on teaching and learning strategies (Attachment-Based Teaching) that are meant to activate small group dynamics and promote social-emotional learning and secure attachments within the larger organization.

Special Education

(1) Track Record: Please explain the extent to which one or more members of the founding school team (e.g., founding board, instructional leader, etc.) has experience working to achieve high academic outcomes of students with disabilities, including students with mild, moderate, and severe disabilities.

Kaitlin Karpinski, Advisor to Rooted School Foundation and Rooted Clark County: Kaitlin Karpinski has a master's degree in Special Education and has been a special educator since 2008. She is a previous special education teacher in Hawaii and has been an instructional coach and school administrator to a wide range of students (mostly high school), including many diverse demographics and cultural backgrounds. She is the new Executive Director of Rooted School–New Orleans.

(2) Identification: How will the school identify students in need of additional supports or services?

- (a) (*Elementary Schools Only*) How will the school accurately identify students prior to enrollment (e.g., those who require pre-school special education and related services) and in the early grades (PreK, K, 1, or 2) for appropriate services?
- (b) (*Middle and High Schools*) How will the school identify and serve students who require special education services and develop transition plans?
- (c) (*All Schools*) How will the school handle over-identification of students as having a disability that qualifies them for special education services? What will be the process to transition a student out of special education who has been incorrectly identified as having a disability in the past?

(3) Continuum of Services: How will the operator provide a broad continuum of instructional options and behavioral supports and interventions for students with a range of disabilities? Specifically describe how students with severe intellectual, learning, and/or emotional disabilities will be served.

Continuum of Services: In accordance with best special education practices, Rooted Clark County will provide a continuum of support and services from those in the least restrictive environment to increasingly restrictive options to meet students' specific needs. Students with disabilities will be provided the services specified in their IEP.

- Related Services: Related services are developmental, corrective, and other support services required to help a student with a disability benefit from instruction within the general education curriculum. Related services may include, but are not limited to: counseling, occupational therapy, physical therapy, school health services, speech/language therapy, hearing/vision services, and other support services (paraprofessional support, sign language/oral interpreters).
- Support Services: Other support services provided to children include, but are not limited to: assistive technology devices, behavior intervention plans, and curriculum modifications.

- Special Education Services: Students receive specially designed supplemental instruction based on their needs as identified in the IEP. The special education teacher works to adjust the learning environment and adopt instructional techniques and methods to meet students' individual needs.
- Transportation Services: In the event the IEP team determines a student needs transportation services, Cactus Park will provide transportation for the student via an owned and licensed bus or via a contracted partner.
- Collaborative Consultant Teacher (CCT)/Co-Teacher: In CCT classrooms students with disabilities and general education students are educated together, by a general education teacher and a special education teacher. The CCT collaborates with the general education teacher and provides instructional support to the student while the special education teacher serving the class adapts and modifies instruction for students with disabilities.
- Adjustments to curricula and instructional programs: Cactus Park teachers will be trained to adjust curricular and instructional programs and practices to meet the need of our special student populations. Because the adjustments are common practices across our schools, students with special needs do not feel "different" from peers in general education, contributing to an overall culture of inclusivity and optimism.

Least Restrictive Environment: Rooted Clark County will comply with all state and federal laws to ensure students with disabilities are served in the Least Restrictive Environment (LRE) where they are afforded access to general curriculum and integration with their non-disabled peers, with appropriate modifications and accommodations as delineated in their IEPs. To that end, individual classroom enrollment may not be comprised of more than 30 percent of students with disabilities. Rooted Clark County will utilize the general education classroom, co-teaching, push- in/pull-out support, alternate assessments, and in rare cases, self-contained Special Education classrooms as a part of a students' LRE. All decisions regarding a student's placement are based on the student's abilities and needs. Before deciding to change a child's LRE, Rooted will confirm that the child has received all the services outlined in the IEP. If a student continues to struggle in their current LRE even with the services outlined in their IEP, the IEP team may convene to determine if the current placement is still appropriate under IDEA. A student's IEP cannot be revised without holding another IEP meeting. Any meetings regarding LRE will include the parent, special education teacher, general education teacher, school administrator, and related service providers.

Accommodations:

- All daily curricula and weekly and unit assessments receive the accommodations and modifications detailed in the students' IEP. General education and special education teachers work together to ensure this is accomplished.
- Based on a student's current level of performance (as determined by diagnostics and current student performance data) students are provided online and written curricula at their instructional level. This includes access to independent, guided and shared reading texts that are appropriate both in content and level to a student's age, developmental level and current instructional level.
- All students receiving special education services also receiveSsmall Group and differentiated instruction as part of their daily schedule. During this time, students receive targeted, skill-based instruction customized to their individual needs.
- Students are given immediate feedback on daily formative assessments and provided with opportunities for remediation on the spot and one-on-one by the general education and/or special education teacher.

(4) General Education Collaboration/Access: How will special education and related service personnel collaborate with general education teachers (e.g., team teaching, team planning, etc.) to ensure that all students are able to access a rigorous general academic curriculum?

See response (6) below.

(5) Staffing: How will you ensure qualified staffing to meet the needs of students with disabilities? *Note: Federal and Nevada law requires licensure for the special education teachers, related service personnel, and psychologists at all charter schools.*

Rooted Clark County will employ a properly certified individual (no subs or waivers) as the Director of Special Education, a Director of School Environment and certified Special Education (no subs or waivers) Teachers. The 22:1 ratio of Nevada will be abided by.

Position	Additional Qualifications
	Degree in Special Education (advanced degree preferred)
Director of Special Education	Track record of success in Special Education instruction and/or management
Director of Special Education	Thorough knowledge of state and federal SPED law and compliance
	Background or understanding of social services
	Degree and licensure in Special Education
	Minimum 1 year experience teaching with similar populations of students
Special Education Teachers	Thorough understanding of the creation and implementation of IEPs
	Advanced capability in collaborating with classroom teachers and differentiating instruction
Director of School Environment	Track record success in former school or similar environment

(6) Staff Development: How does the school plan to train general education teachers to modify the curriculum and instruction to address the unique needs of students with disabilities?

The Director of Special Education and Director of School Environment will hold targeted professional development ensuring that all staff will be working on proper identification of at-risk students in potential need of services. All teachers will receive full training from our Director of Special Education and Director of School Environment in our referral process, as well is in the successful implementation of modifications and accommodations within the classroom. Licensed special education consultants will also be used when abiding by Nevada state law requires a more fine-tuned approach.

During their regular meetings, teachers will discuss and strategize to meet the needs of students identified as needing additional assistance. Staff development enables school personnel to be well informed about and trained to carry out least restrictive environment initiatives. The entire staff, including administrators, general educators, special educators, and paraprofessionals, will be trained to educate students with disabilities and it is expected that teachers take advantage of the special education teacher in their classrooms to help them develop units, lesson plans or classroom activities to ensure appropriate accommodations are met. This collaboration will also allow for teachers to understand impactful trauma-informed strategies for their general education students, as well.

(7) Discipline: Explain how the school will protect the rights of students with disabilities in disciplinary actions and proceedings and exhaust all options in order to promote the continuation of educational services in the home school.

Rooted Clark County will follow all provisions of federal and Nevada state law relating to students with disabilities, including the Individuals with Disabilities Education Act (IDEA) and Section 504 of the Rehabilitation Act of 1973. All students with qualifying disabilities under IDEA shall have access to a free and appropriate public education (FAPE), receive an evaluation, IEP, and an appropriate education in the least restrictive environment; be involved in decisions regarding the IEP, along with their parent/guardian(s); and have access to appropriate procedures to resolve any disputes related to the school's provision of FAPE. We shall maintain student education records in line with the federal Family Educational Rights Privacy Act of 1974 (FERPA) as they relate to students with disabilities. This includes but is not limited to having procedures for protecting the privacy of student education records.

Additionally, Rooted Clark County utilizes restorative justice and trauma-informed practices across all student demographics in times of distress, in creation of IEPs, and/or disciplinary action. A thorough, fair, and deeply empathetic approach is always utilized and will regularly fall within the 504, BIP, and/or IEP guidelines for students with disabilities.

(8) Monitoring: What are your plans for monitoring and evaluating both the progress and success of students who qualify for special education and related services, and the extent to which your special education program complies with relevant federal and state laws? How will curriculum and instructional decisions be tracked and monitored by IEP teams and school personnel?

Rooted Clark County's Director of Special Education, Director of School Environment, and Special Education team will oversee the implementation of the IEP services. A copy of the IEP, along with procedural safeguards, will be given to all the student's teachers and the student's parent/guardian(s). We will carefully monitor the progress of students in the RTI process or possessing IEPs through a bi-weekly standing debrief between the academic team and the student's Special Education and General Education teachers. The student's most current assessment data from core academic subjects will be collected and analyzed.

The school monitors and evaluates the progress of students in special education with the same frequency and intensity of their peers in general education. In the event a student is progressing more quickly than expected or not progressing at a rate that will allow him/her to meet his/her annual IEP goal, the IEP team may convene periodically to adjust annual goals and/or accommodations and modifications.

The following methods are ways to monitor progress for students with an IEP. The methods have been adapted from national sources and best practices witnessed at NewSchools Venture Fund fellow cohort meetings, Charter School Growth Fund portfolio meetings, and the SELF fellowship.

- Daily: Students in special education who have daily behavior plans receive daily "progress towards goal" updates to be shared with parents/guardians each night.
- Weekly: Parents/guardians receive weekly progress updates based on student performance on adaptive online curricula. As established in their IEP, students in special education receive accommodations and modifications on weekly assessments as appropriate. Special Education may conduct additional mini-assessments of sub-goals to gather data on student performance relative to the annual goal. These data points are rolled up and shared with families through the quarterly IEP report card.
- Quarterly: Parents/guardians receive quarterly IEP updates in which special educations teachers share a student's performance relative to his/her annual goals; this is called the IEP Report Card. All students receiving special education services receive a standard school report card.

Parents/guardians are asked to meet with the student's classroom and Special Education teacher to discuss progress toward both final grades and IEP annual goals.

• Annually: All parents/guardians of students receiving Special Education services will meet with the rest of the IEP team annually. At this time parents/guardians receive an additional update with a final determination as to whether a student has met annual IEP goals; All parents/guardians and students receive a report card indicating final grades in all subject areas for that school year.

All students with IEPs shall be re-evaluated a minimum of once every three years. In addition, if a parent/guardian requests that their child is reevaluated, we will respond to that request promptly. Communication with families/guardians of our special needs students will be a priority, and they will participate in an additional special services meeting during our Parent-Teacher conferences. At the close of each student's annual review or three-year re-evaluation the parent will receive a copy of the new IEP.

(9) Parental Involvement: What appropriate programs, activities, and procedures will be implemented for the participation of parents of students with disabilities?

The above certified individuals will ensure that parents/guardians of children with special needs are informed of a case conference that may need to be help and informed of their student's progress on annual IEP goals and in the general curriculum frequently. The DSS and Director of School Environment shall provide annual trainings to families whose children are identified as receiving special education services, reviewing with families the IEP process and documentation, the difference between modifications and accommodations, and the due process rights of families within the process. piloted will make contact information available for outside support resources and have on campus mini conferences from available outside support resources.

(10) For Distance Education Schools: Describe how the school will provide appropriate services in the distance education learning environment to students with disabilities. *If you are not proposing to operate a distance education or virtual school, please explain that this is not applicable.*

N/A as we are not providing distance education.

(11)Please approximate how many students would qualify for these services. Please provide the rationale used in this approximation.

It is our expectation that Rooted Clark County will have a special education program consisting of 12-15% of the student population based on the projections from other high schools servicing our target zip codes.

English Language Learners

(12) Identification: What methods will you employ to identify English Language Learners? How will you work to avoid misidentification?

The ELL program at Rooted Clark County will identify students as English language learners (ELL) when parents enroll their child. During enrollment, all parents will complete a Home Language Survey. The Home Language Survey will ask three questions to determine the student's primary language (as indicated by Nevada Department of Education's Title III Guidance and NAC 388.620):

- What was the first language spoken by the student?
- What is the primary language(s) spoken in the home?
- What is the language most spoken by the student?

If a language other than English is provided as response to any of the questions in the Home Language Survey, the student will be assessed using state approved assessments (i.e. WIDA Screener) if he or she has not previously been identified as an English learner by a Nevada public school or there is no record of WIDA ACCESS results. The appropriate WIDA placement screener will take place within 30 days of the start of the school year or within two (2) weeks after the date of the student's first enrollment at Rooted Clark County.

(13)Placement: How will the results of the W-APT assessment and other identification and program placement decisions be communicated to staff and parents?

Once the student has taken the appropriate WIDA assessment, results will be used to create an Individual Language Education Plan (ILEP) for the student. The plan will describe the student's level of English proficiency (based on the score from the WIDA assessment), the type of service the student will receive from the ELL Program, accommodations for both the classroom instruction and assessments (including state standardized testing), and language goals for the student. The ELL Coordinator will be responsible for creating the student's ILEP and sharing the plan with the student and their family; the student, their parents/guardians, and classroom teachers will also be able to participate in the development of the ILEP if they choose to.

For those students who are newly identified as an English language learner, results from the appropriate WIDA Screener and the ILEP will be mailed to the student's parents/guardians; this will ensure the family receives the information. This information will be mailed to the family within 30 days if it's the start of the school year or within two weeks after the student's first enrollment at Rooted Clark County.

For those ELLs returning to Rooted, the ELL Coordinator will update the student's ILEP with information from the previous year's WIDA ACCESS results. A copy of the WIDA ACCESS results and the ILEP will be mailed to the student's parents/guardians to ensure the information is received.

Classroom teachers will receive a copy of the Individual Language Education Plans for the students in their classroom; since the plan includes the student's WIDA scores (Screener or annual ACCESS assessment), the teacher will be aware of their students' language proficiency.

(14)Staffing: How will you ensure qualified staffing to meet the needs of ELL students, conduct assessments, and monitor the progress of ELL students? *Note: Nevada law requires licensure (TESL endorsement) for the primary teacher providing ELL services in pull-out and inclusive environments at all charter schools.*

When hiring qualified staff to meet the needs of ELLs at Rooted Clark County, we will hire teachers who hold an English Language Acquisition and Development (ELAD) certification (see NAC 391.237) in addition to a Nevada teaching license. Priority will be placed on hiring teacher(s) who are multilingual.

The English Language Learner (ELL) Coordinator will be responsible for administering the appropriate WIDA screener to new students. The ELL Coordinator will be certified to administer WIDA assessments (both the WIDA screener and annual ACCESS assessment); certification will be achieved through the online trainings and certification quizzes provided by WIDA.

The ELL Coordinator will be responsible for the monitoring of English learners; monitoring will take place at the end of every grading period. The ELL Coordinator will distribute the monitoring form to classroom teachers, and classroom teachers will fill out the form for each of the ELLs in their classroom. The ELL Coordinator will work with the classroom teacher to explain the purpose of monitoring ELLs and what will be done with the monitoring data. If an ELL is not making progress in the classroom, the ELL Coordinator will update the student's ILEP with accommodations that are needed as well as a change in services provided by the ELL Coordinator and ELL Teachers. Parents will be notified of any changes in their student's ILEP and ELL services; changes made during the school year will be communicated with parents/guardians by both mail and phone calls.

(15)Curriculum and Instruction: What specific instructional programs, practices, and strategies will be employed to ensure academic success and equitable access to the core academic program for English Language Learners?

The ELL program will be designed to meet the three-pronged test under Castañeda v. Pickard (1981):

- The program must be based on educational theory.
- The program must be implemented effectively with sufficient resources and personnel.
- The program must be evaluated to determine if students (ELLs) are making progress in overcoming their language barriers.

Educational Theory: English language learners will have an ELL program that will focus on language development grounded in WIDA; WIDA's theoretical framework includes the zone of proximal development (Vygotsky, 1978) and language is used for meaning making (Halliday & Hasan, 1985). Services in the ELL program will include pull-out instruction for at least 30 minutes 2-3 times a week with the ELL Teacher; the curriculum for the instruction will be based on the WIDA standards of using context for language learning. The ELL Teacher will also provide push-in services for those students at a lower level of English proficiency. Using the data from monitoring, intervention services will be provided to atrisk ELL students; intervention services will be designed to help students become successful in the academic content.

(16)Monitoring: What plans are in place for monitoring and evaluating the progress and success of ELL students, including the process for exiting students from ELL services as needed?

The ELL Coordinator will be responsible for the monitoring and evaluating the progress and success of the ELL student at Rooted Clark County.

Monitoring will be done through a form created by the ELL Coordinator; this form will be completed by classroom teachers at the end of each grading period. It will ask for information about the success of the student's ILEP, current academic strengths, and academic concerns for the student; it will also ask the classroom teacher if any changes need to be made to the studen's ILEP. The ELL Coordinator will follow up with the classroom teacher about any changes in the ILEP and/or ELL services for the student. If it is found that a change in ELL services and/or the ILEP is needed, the parents/guardians of the student will be notified by both mail and phone call.

ELL students will be exited from ELL services once the student has met one of the criteria set by the Nevada Department of Education (student can meet either one to exit services):

- The ELL achieves an overall Composite score of 4.5 or higher on the WIDA ACCESS.
- The ELL achieves an overall Composite score of 4.0 on WIDA ACCESS AND met content proficiency on the state ELA and Math assessments AND met other additional requirements under the Nevada Department of Education (example: evidence the student can succeed academically without ELL services, student will graduate on time).

Once the student meets one of the exit criteria listed above, the ELL Coordinator will meet with the student and the student's parents/guardians to discuss exiting the student from ELL services. The ELL Coordinator will explain what this will mean for the student and their schooling (example: no longer taking the annual WIDA assessment, will no longer receive accommodations on standardized tests).

(17)Parental Involvement: What appropriate programs, activities, and procedures will be implemented for the participation of parents of ELLs?

Parents of English language learners will be able to participate in all programs available at Rooted Clark County. Parents will be invited to attend school-wide events, and programs and activities will be accessible in the parents' primary language when necessary. The ELL Coordinator will reach out to the parents of ELLs and invite them to programs and activities at the school.

School notices will also be provided in parents' primary language when possible. Parents will be invited to participate in parent-teacher conferences, and Rooted Clark County will provide an interpreter for parents who need one in order for parents to fully participate in conferences.

School staff will be informed of which staff to reach out to if they are needing an interpreter or a school notice translated for a family. If there is not a staff member available for a language, the ELL Coordinator will connect with local community resources to locate translators and interpreters to keep on call. The ELL Coordinator will maintain a list of translators and interpreters for the school to utilize.

(18) For Distance Education Schools: Describe how the school will provide appropriate services in the distance education learning environment to ELLs. If you are not proposing to operate a distance education or virtual school, please explain that this is not applicable.

N/A as we are not doing a distance education program.

(19)Please approximate how many students would qualify for these services. Please provide the rationale used in this approximation.

We anticipate 35-45% of our students to be eligible for ELL services. This is an estimate based off the location we intend to open within and based on current school numbers.

Homeless/Migrant Services

(1) Identification: What methods will you employ to identify families who qualify for homeless and/or migrant services? How will you work to avoid misidentification?

See response in (2) below.

(2) Meeting the Need: How will you ensure that identified families receive the required services within the mandated timeframe?

Rooted Clark County will use an automated survey system so parents upon enrollment and throughout the year are able to express their specific needs as they pertain to housing, food insecurity, and homelessness. The Director of School Environment will run lead on all partnerships with homeless shelters, food pantries, and other service organizations to ensure our families have what they need.

Based on the successful homeless/migrant services provided by the New Orleans campus, Rooted Clark County will be effective in tracking student housing status, provide support within the mandated time frame, and continually monitor student academic progress, social & emotional health, and general wellbeing through regular check-ins.

(3) For Distance Education Schools: Describe how the school will provide appropriate services in the distance education learning environment to students who qualify for homeless and/or migrant services. *If you are not proposing to operate a distance education or virtual school, please explain that this is not applicable.*

N/A as we are not opening a distance education school.

SCHOOL STRUCTURE: CULTURE

(1) Describe the culture or ethos of the proposed school. Explain how it will promote a positive academic environment and reinforce student intellectual and social development.

The culture of Rooted School is to foster an emotionally safe environment where students feel accepted for who they are and can develop into self-directed learners. A significant way that Rooted Clark County will engrain this ethos is through implementing Pre-Career Levels (PCL). PCLs are another phrase for grade levels and describe the academic and values-aligned behavior that enables a students to progress from one grade to the next at Rooted.

In addition to mastering their course material, students must also act in a values-aligned manner to earn additional freedoms and privileges in Rooted's culture. Students' PCL progression is explained in the table below and specific exit standards for Rooted Clark County graduates.

Pre-Career Level (PCL) Progression Requirements	PCL 1-4 (Grades 9-12)
 Academic Badges: Each course has between 4–10 badges (also known as units of study) 	(and to)
 Students will be responsible for taking midbadge and end of badge assessments. Once a student earns mastery (>75%) on their end-of-badge assessment and completes all badge coursework, they will earn a summative academic badge for the course 	Earn >75% on their end-of-course academic badge assessments and complete all academic badge
 Cultural Badges: In addition to achieving academic badges, students must also earn cultural badges to progress 	coursework for each class. Earn at least 10 Values badges
 There are two types of cultural badges: Balloon badges and Values badges. Students can earn 1 Balloon badge per week for having 0 referrals (no level 3 offenses) Students are expected to earn 10 	

(2) Explain how you will create and implement this culture for students, teachers, administrators, and parents starting from the first day of school. Describe the plan for enculturating students who enter the school mid-year.

(3) Please describe how you will evaluate school culture and evaluate implementation of your culture plan. Include how parent and student feedback will be incorporated in measuring your school's success in creating a positive culture.

(4) Describe the school's approach to help support all students' social and emotional needs. Detail the identification strategy, interventions, and remediation to be implemented and cite the research/rationale for the selected methods.

Described in the At-Risk Students and Special Populations section.

(5) Discuss any required dress code or uniform policy.

SCHOOL STRUCTURE: STUDENT DISCIPLINE

(1) Describe the school's discipline policy. Discuss the practices the school will use to promote good discipline, including both penalties for infractions and incentives for positive behavior.

(2) Describe the procedures for due process when a student is suspended or expelled as a result of a code of conduct violation, including a description of the appeal process that the school will employ for students facing expulsion.

(3) Describe the process for completing a plan of action based on restorative justice prior to engaging in suspension and/or expulsion proceedings as required under Assembly Bill 168 (2019).

(4) Who will be responsible for implementing the school's discipline policy, including ensuring that accurate disciplinary records are maintained, and that discipline data Is reported to the SPCSA?

(5) How will the school track discipline data and how will this data be used make needed changes for school culture? What actions does the school plan to take in order to monitor for and prevent disparities in discipline practices between student groups? For CMO applicants, and applicants intending to contract with a CMO or EMO, describe how the schools currently affiliated with the CMO/EMO have monitored for and addressed any disparities in discipline practices between student groups.

(6) Describe the school's proposed parent grievance policy.

Overall Approach and Culturally Responsive Discipline: Rooted Clark County's discipline policy is designed to support the whole student in a culturally responsive climate for both learning and achievement. This is in direct alignment with the school's values of Growth and Community as well as our overall goal to prepare students for professional workplace cultures.

Rooted's discipline policy is designed to avoid the disproportional rates of discipline that students of color have faced. The school's discipline policy follows all state and federal guidelines, utilizing best practices and prior experience.

Restorative Practices: Inherent in Rooted Clark County's secure attachment work is our focus on the positive long-term impact of healthy relationships in our schools. We have adopted a restorative practices model that aligns with our core beliefs and with the legal discipline requirements mandated by the State of Nevada.

Whereas traditional discipline focuses on the violation of rules, restorative practices focus on the violation of people and relationships. In every classroom, relationships among individuals either foster and facilitate students' learning or prevent it. Restorative practices are built on those positive relationships that adults intentionally build with students. When students care about the relationships they have with others, they work to keep those relationships healthy and work intentionally to repair damage to them.

Research from the International Institute for Restorative Practices (IIRP) indicates that for restorative practices to work, continual training and professional development along with an overarching paradigm shift from traditional school disciplinary programs is required.

Case studies and evaluations conducted in schools worldwide indicate that restorative practices improve relationships among students and teachers, reduce disciplinary problems and build community.

Changing from a punitive to a restorative mindset represents a paradigm shift that McCold and others believe is critical. Moreover, restorative practices are specifically responsive to Rooted"s anticipated student population of students with disabilities.

Restorative practices are key to helping children with diverse needs improve their behavior, learning and interactions with others. These include "separating the deed from the doer" and utilizing exploratory

questions, which allow students to understand their own problematic actions as external attributes — mistakes that can be corrected — rather than immutable elements of their personality or identity.⁴³

The chart below outlines the fundamental conceptual differences between punitive and restorative mindsets in schools. Each teacher and staff member at Rooted Clark County receive training in this paradigm shift prior to the school year starting and receive coaching and training throughout the year to ensure responsiveness to student culture and climate data.

Punitive	Restorative		
Rules are violated	Relationships are violated		
Guilt is established	Needs and obligations are established		
Accountability is defined as punishment	Accountability is defined as effects and repaired		
Justice desired by victim	Offender, victim, and school all have direct roles		
	in pursuing justice		
No opportunity for remorse	Opportunities to express remorse		

The chart that follows outlines the school's restorative behavioral intervention responses. The Restorative Center (RC) is a designated room within the school that allows the student to reflect until they are prepared to repair harm caused by Level 3 or 4 offenses. Note, that ISS stands for in-school suspension and OSS stands for out-of-school suspension.

Level	Response	Description	Family	RC	ISS/ OSS	
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⁴³ Getty, J. (2018, April 26). Diverse needs students gain essential social skills with restorative practices. Retrieved August 20, 2020, from <u>https://www.iirp.edu/news/special-needs-students-gain-essential-social-skills-with-restorative-practices</u>

Level 1	Redirect	 A student causes a minor disruption to the learning environment. The teacher quickly redirects the student to meet the expectations. 	No	No	No	
Level 2	Reflect	 A student causes a significant disruption to the learning environment and/or repeats Level 1 behaviors after redirection. The teacher re-establishes the focus of the class and engages in a hallway conversation to reflect with the student on their decisions and behavior. 	No	No	No	
Level 3	Reach Out	 A student causes a disruption to the learning environment that breaches safety and/or repeats Level 2 behaviors after redirection and reflection. The teacher refers the student to the office and re-establishes the safety and focus of the class. The administrator reflects with the student and plans next steps including communication with families and mentors. A repair is scheduled and facilitated with teammates and students directly. 	Yes	Yes	No	
Level 4	Reset	 A student causes a significant breach in safety and/or repeats Level 3 behaviors after interventions. The teacher refers the student to the office and re-establishes the safety and focus of the class. The administrator considers suspension or expulsion, plans next steps, and communicates with families and mentors. 	Yes	Yes	TBD	
School I	*It should be noted that this program is overseen and audited by the School Leader, but the Assistant School Leader, when hired, is the primary individual tasked with the day-to-day management of these responsibilities.					

Our most frequent strategies are outlined below:

- Hold individual conferences to discuss problematic behavior
- Allow everyone involved in the harm to share their side of the story
- Allow harm to be repaired by the one(s) who enacted the harm
- Hold an effective hallway conversation before writing a formal referral
- Re-establish the focus of the class
- Ask probing questions/seek to understand
- Create a plan together on how to return to the learning environment
- Norm on consequence(s) if this behavior happens again
- Schedule a time to reflect with the student (or student and parent) on his/her decisions and behavior

SCHOOL STRUCTURE: CALENDAR AND SCHEDULE

(1) As Attachment 3, provide the annual academic schedule for the school (included in the student/parent handbook). Explain how the calendar reflects the needs of the student population and the educational model.

At RS-CC the school year is divided into 5 instructional sessions over 184 days. Sessions last from 4-13 weeks before a week-long session break. Session breaks allow students to continue their self-directed learning at home, while teachers can use their breaks to analyze data, adjust badge playlists and curriculum and deepen collaborative peer relationships. Our session breaks are usually aligned to typical holidays to lessen impacts on families accustomed to a more traditional school year structure and that may have students in the local school district. Furthermore, our session structure meets the needs of our anticipated student populations (i.e. low-income students, students of color and students with disabilities) that may come in academically lagging, because it provides ample time for students to make accelerated gains through mastery-based course work.

- Session 1 is dedicated to intentional student and parent onboarding to the instructional model:
 - Introduction to technology resources and certifications
 - Completion of diagnostic assessments

We recognize that the RS-CC model is unique and will need time for students and parents to learn it.

- Sessions 2–3 are similar in length and are when a majority of the credentials and project-based learning happens during the academic year
- Session 4 is the longest session of the year to accommodate standardized assessments and end-ofyear project-based learning exhibitions
- Session 5 (Mandated for any Student Not Passing All Classes) also known as June School, allows for students who need additional remediation and intervention to receive further supports in earning credits and making growth.
 - Students who have completed their course work to engage in internships, extra technology credentialing, future coursework, passion projects and independent study

The school day length is designed to mimic traditional hours of employment, with students arriving at 8:30 AM and departing at 4:15 PM, in alignment with Rooted's goals of preparing our students for entry-level employment at local technology companies upon high school graduation. Instructional Time.

RS-CC's yearly academic schedule provides at least 184 instructional days. June School will be required for any student who has not successfully completed all course work by the close of the final session. The length of a typical RS-CC school day is 425 minutes for all students in grades 9-12, with students arriving at 8:30 AM and departing at 4:15 PM.

RS-CC's school year will feature 13 early dismissal days. Early dismissal days are in place for teammates to engage in professional development and parent outreach. Students arrive at 8:30 AM and dismiss at 1:00 PM, resulting in a total of 240 minutes of instruction per early dismissal day. This is the equivalent of 52 hours throughout the academic year.

Total Num	ber of Days	Number of Early Dismissal Days	Number of Full Days
Aug	18	4	14
Sept	16	1	15
Oct	15	1	14
Nov	16	1	15
Dec	15	1	14
Jan	16	1	15
Feb	14	0	14
Mar	23	2	21
Apr	14	1	13
May	19	1	18
June	18	0	18
Total:	184	13	171
Total Day	s Per Year	Early Dismissal Day Schedule	Full Day Schedule
1	84	8:30 - 1:00 (30 mins Lunch/Flex)	8:30 - 4:15 (40 mins Lunch/Flex)
Total Instruction	nal Mins Per Year	Instructional Mins per Early Dissmal Day	Instructional Minutes per Full Day
75	795	240	425

The table on the following page shows the instructional day and hour requirement for students.

(2) Describe the structure of the school day and week, including the length of the school day, start times, and dismissal times. Include the number of instructional minutes/hours in a day for core subjects such as language arts, mathematics, science, and social studies. Explain why the school's

daily and weekly schedule will be optimal for the school model and for student learning. Provide the minimum number of hours/minutes per day and week that the school will devote to academic instruction in each grade.

The school's daily and weekly schedule supports the proposed educational program by maximizing instructional time in the hybrid-learning model.

This schedule allows students to spend four self-directed learning blocks in core content (science, math, English, and social studies), two self-directed learning blocks in technology and one self-directed learning block where students are able to choose which coursework they need to prioritize.

Students are able to engage in social and emotional learning during advisory and throughout their school day.

Lunch and flex time provides students the opportunity to engage in clubs, leadership activities, video games and other intra-mural competitions. By scheduling a 7-period day, students can engage in a consistent learning experience, with intervention happening through both push-in and pull-out structures during their regularly scheduled courses.

On early dismissal days, students are able to select a course (or courses) of their choosing to focus on implementing feedback given by teachers, resubmitting assignments, digging deep into project-based learning, studying for a certification or receiving small group targeted intervention in the self-directed learning environment.

On full school days, students spend 220-230 minutes/3.7/3.8 hours a day in core content classes (math, science, social students, ELA learning blocks); 110 minutes/1.8 hours a day in elective technology courses, which are a key educational design element for RS-N; and 30 minutes/.5 hours a day in advisory, another key RS-CC program element.

SAMPLE STUDENT & TEACHER SCHEDULES

	SAM LE STODENT & TEACHER	
PERIODS	GRADE 9 STUDENT	ELA TEACHER
Advisory	Advisory	Advisory
SDL 1	Compu Sys Net Lab	English I
SDL 2	Comp TIA+ Networking and Fundamentals	ELL Support
SDL 3	US History	English I
	LUNCH	
SDL 4	Alg I	Planning Conf
SDL 5	Environmental Science	English III G
SDL 6	Physical Education / Health	English II
SDL 7	World Language / Elective	English II
	SNACK & DISMISSAL	

See the sample teacher and student schedules below:

(3) Describe your goal for student attendance and explain how you will ensure high rates of student attendance. Who will be responsible for collecting and monitoring attendance data? What supports will be in place to reduce truancy and chronic absenteeism?

The student attendance goal is 90% daily attendance on average for all grades. The School Leader and the Director of School Operations will work in concert to ensure that transportation is running smoothly and seamlessly ensuring full access to on-time school arrival.

The School Leader will be responsible for contact families of students who have missed school on a daily basis with no previous parent contact/notification

(4) Operations Plan

BOARD GOVERNANCE

(1) Describe the primary roles of the governing board and how it will interact with the principal / head of school and any advisory bodies. Explain how the board will evaluate the success of the school and school leader; and how the board will ensure that there will be active and effective representation of key stakeholders, including parents.

Roles and Responsibilities

Below are the current roles and responsibilities for the Rooted School—Clark County Board of Directors. The roles for the board have been determined by "best practice" considering an organization of Rooted's size and current regional impact:

- **Board Chair:** Presides over all meetings of the Board of Directors and other meetings as required. The chair is also an ex-officio member of all board sub-committees. The board chair oversees the implementation of the board's strategic goals and policies to ensure that appropriate administrative practices are established and maintained.
- **Board Treasurer:** The treasurer provides direction for the financial management of the organization and helps the board meet its financial oversight responsibilities.
- **Board Secretary:** The secretary provides direction for the keeping of legal documents, including minutes of all meetings of the board.
- **Executive Director/School Leader:** The Executive Director of RS-CC will be responsible and accountable to RS-CC's board. The Executive will report monthly on the school's progress in relation to its charter contract goals, fiscal integrity and transparency, academic growth and stakeholder accountability. The ED/School Leader will also be responsible for the day-to-day running of the school for ensuring that the Rooted model is appropriately contextualized for Nevada and implemented as intended.

Board Members and School Leader – Four board members have spent over a combined 20 years living, working, and/or serving the North and East Las Vegas communities. Rooted School–Clark County has not yet identified a Founding School Leader.

Focus Groups – Rooted Clark County has conducted over 5 online forums since December 2020 and have interviewed and collected feedback from over 100 prospective students and parents since that time. During these interviews, we ask three questions:

- What gaps exist amongst high school offerings in North and East Last Vegas?
- What are the barriers to economic opportunity in the community?
- What programs/initiatives would you like to see at a new high school in the community?

Through these ZOOM meetings and in-person presentations, the Rooted Clark County team was able to collect valuable information about what parents/guardians and students wanted to see in a new high school option. We have summarized most of the responses below using major themes that were talked about at-length:

- What gaps exist amongst high school offerings in Clark County?
 - Not enough 4- and 5-star options
 - High schools are overcrowded, and students are getting lost
 - Difficult to trust schools to deliver on promises made in CCSD
 - Students are prepared for the changing workforce
- What are the barriers to economic opportunity in the community?
 - o Lack of access to training programs
 - Lack of access to employers paying above a living-wage
 - Rising costs of expenses
 - Lack of affordability of college
- What programs/initiatives would you like to see at a new high school in the community?
 - Smaller school setting
 - o Personalized learning environment
 - Sports program with different sports (i.e. basketball, football, debate, baseball, volleyball)
 - Active school clubs (i.e. baking, video games, art, music, electronics)
 - School mascot with something from the desert
 - Classes that will give students job experience and skills like engineering and computation
- ZOOM Interviews/Focus Groups + In-person presentations To-date the Rooted Clark County team has held informational interviews and presentations with over 100 prospective students and parents. The following questions were asked to further the impact of the school model. The various answers are documented above.
 - What haps exist amongst high school offerings in Clark County?
 - What are the barriers to economic opportunity in the community?
 - What programs/initiatives would you like to see at a new high school in the community?

RS-CC board members will be responsible for the overall supervision of academic, finance/ operations and adherence to the charter contract. The board will develop and approve the annual budget as well as all school policies. The board will also set goals and review strategies to continually guide the school towards the fulfillment of its mission. The board will be structured to include, at least, a chair, secretary and treasurer. Board members will serve renewable two-year terms.

Each board member will serve on one of the following projected committees:

- Governance
- Board Development

- Curriculum & Academics
- Capital, Budget & Finance
- Human Resources
- Real Estate, Facilities & Operations
- Community Engagement & Student Recruitment

The RS-CC school leader will implement the school's mission and report directly to the board on all major, school-related matters. The school leader will present monthly reports at each board meeting reporting on progress made towards academic, financial and operational goals, utilizing the *Board on Track* online platform to house board packets and the organization's key performance indicators dashboard. The school leader will be charged with hiring, setting compensation for, supporting, and evaluating all other school staff. The school leader will attend all board meetings and will serve as ex-officio, non-voting board member.

Board Policies and Decision Making

The Board of Directors (BOD) of RS-CC will have the sole responsibility for setting policy for the local campus so long as those policies align with the stipulations agreed to in its licensing arrangement with Rooted School Foundation. This local perspective is mission critical for us because the levers needed to execute the Rooted mission will be different city to city.

The BOD will expand and develop over time through recruitment of new board members after assessing the needs of the current board during an annual board retreat. After authorization and the founding board's transition to the governing board (if applicable), the BOD will continue to select members based on a commitment to support, maintain and uphold its mission and vision and to take on the governance responsibilities of a charter school board member accountable to the public.

As it creates policies, the BOD will consider external factors such as legal requirements (including those stipulated by the charter contract and Nevada State law), as well as the organization's vision, mission, and current strategic plan. The BOD will ensure that all policies are aligned to the organization's Articles of Incorporation and Bylaws, and that all stakeholders are able to inform the impact of proposed policies.

The BOD will meet monthly and all policies and decisions will be subject to public meetings with consent agendas approved in advance, documents for discussion issued one week prior to any BOD meeting and public comments and board management discussions held at every meeting. The BODwill operate according to *Robert's Rules of Order* to ensure streamlined, informed decision-making for the school.

(2) Summarize the qualifications and experience of proposed members of the governing body of the school. Please identify each proposed board member and describe why they are uniquely qualified to serve on this governing board serving this target community. Additionally, please submit the requested board information in the provided Board Member Template (provide as Attachment 4).

A sponsor may not accept an application from a committee to form a charter school whose membership includes:

- (a) A potential contractor of the proposed charter school;
- (b) A potential lessor of a facility that the proposed charter school may lease;

- (c) A representative of an educational management organization with which the proposed charter school may contract
- (d) A person related by blood or marriage to a person described in paragraph (a), (b) or (c); or
- (e) Two or more persons who are related by blood or marriage to each other.

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CURRENT BOARD MEMBERS Name & Title on Board (if applicable)	OCCUPATION	LARGEST BUDGET MANAGED/ OVERSEEN (\$ or N/A)	Accounting/Pinance	Fundraising/Development	Comstruction/Real Estate	Lagal	Technology	PR/ HR/Communications	Education	Medical	Community/Volunteer	Board Experience	Development	Real Estate	Board Development	Finance	Governance	Capital Campeign
John Etzel	Executive Director, Boys Town Nevada	Unknown		X							X	X						
Melissa Gruenhagen	Principal - Cristo Rey	Unknown		X					X		Х	X						
Bilalia Mubashshir	Eprocurement Senior Software Consultant	Unknown	X				X				X		THO	THO	THO	THO	ī	1
Merrick Murray	Title I Strategiest - Data	Unknown							X				Ĩ		1	1	-	
Greer Perkins	Educator/TFA School Leader Fellow	Unknown							X									

EXPERIENCED APPLICANT BOARD MEMBER ROSTER

***SEE ATTACHMENT 4 – BOARD MEMBER TEMPLATE**

(3) Provide, as Attachment 5, a completed, signed, and notarized Board Member Information Sheet for each proposed Board member as well as the board member's resume and a thoughtful biographical summary outlining the particular qualifications of each board member as relates to both service on a public charter school board and to the specific needs of this particular proposed charter school.

***SEE ATTACHMENT 5 – BOARD MEMBER INFORMATION**

(4) If the full founding board has not yet been identified, explain how and when the additional board members will be identified.

*Not applicable at this time.

(5) Describe the board's ethical standards and procedures for identifying and addressing conflicts of interest. Provide, as Attachment 6, the board's proposed Bylaws, Code of Ethics, and Conflict of Interest policy.

*SEE ATTACHMENT 6 - ROOTED SCHOOL CLARK COUNTY BOARD OF ETHICS

(6) Identify any existing relationships that could pose actual or perceived conflicts if the application is approved; discuss specific steps that the board will take to avoid any actual conflicts and to mitigate perceived conflicts. *If these relationships pertain to members of the committee to form, this information should match the committee to form disclosures.*

There are currently no existing or anticipated relationships between our proposed committee to form and the Rooted School organization that pose real or perceived conflicts of interest.

To ensure that this remains so, RS-CC's board will approve and implement a conflict of interest policy that will confer a duty to disclose for all members which includes the responsibility of knowing which interests they maintain.

The conflict of interest policy will require annual financial disclosures (as may be required by Nevada legislation) and full disclosure prior to the approval of any contracts or major expenditures. Before a vote that affects any financial resource or the decision-making authority of the board, the chair will call for any conflicts. Each member is then responsible to self-identify potential, perceived or actual conflicts.

The board will then discuss the nature of the potential conflict with the affected member, determine the appropriate remedy from options ranging from abstaining from the vote, removal from discussion pertaining to the vote, to removal from board. If needed, a waiting period will be implemented for board members to execute a full review of their affairs to research potential conflicts.

(7) Describe plans for increasing the capacity of the governing board. How will the board expand and develop over time?

The current board members have been identified, vetted and selected by the Rooted CEO and the Rooted School Foundation to ensure a diverse, highly qualified, locally representative and missionaligned founding board. To select board members, the CEO interviewed prospects, reviewed their resumes, conducted reference checks and made membership offers. When RS-CC transitions to be a governing board, the Governance Committee will track term expirations and lead all future board member sourcing, nominations and selection. This approach will be codified to guarantee a consistent process.

At an annual retreat, the governance committee will identify skill set gaps and vacancies on the board and facilitate board performance evaluations using Board on Track tools. At the retreat, the school leader, board chair and governance committee will also determine and plan the professional development that is needed or required each year.

A majority vote by all current members is required for board member additions. The governance committee will oversee background checks and new member orientations. The committee will also develop and distribute a board handbook that includes: a board member job description, a performance expectations agreement, committee details and a copy of the school's charter.



SAMPLE BOARD CANDIDATE EVALUATION FORM

DATE
CANDIDATE
EVALUATOR

DR	NAME		

NAME

COMMITMENT

Is the candidate	villing to devote her/his full energy and talent to the bo	ard?

Is their understanding of their responsibilities as a board member aligned with our expectations? Do they have the time necessary to be an active board member?

Even in the face of organizational challenges and difficulties, will the candidate remain committee

organization?

Dofinitely Reject Probably Reject Unsure Probably Invite Dofinitely In

PHILOSOPHICAL ALIGNMENT

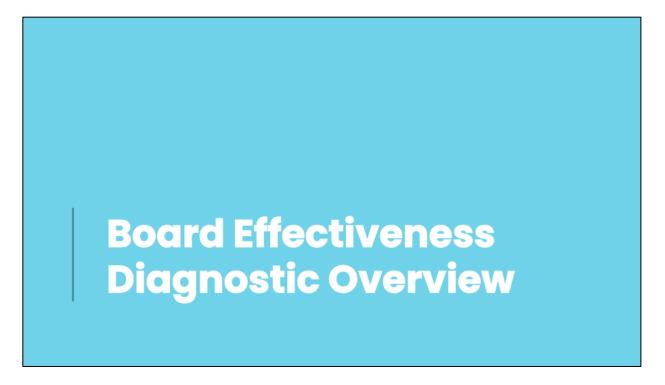
(8) Describe the kinds of orientation or training new board members will receive and what kinds of ongoing development existing board members will receive. The plan for training and development should include a timetable, specific topics to be addressed, and requirements for participation.

Board Training and Development:

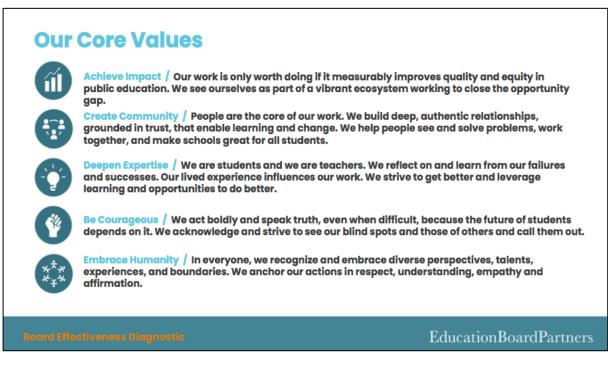
Rooted School will explore a partnership with an organization such as *Charter Board Partners* (CBP) or *Board on Track* (BoT) to provide initial training to the local board. This training provides the groundwork for:

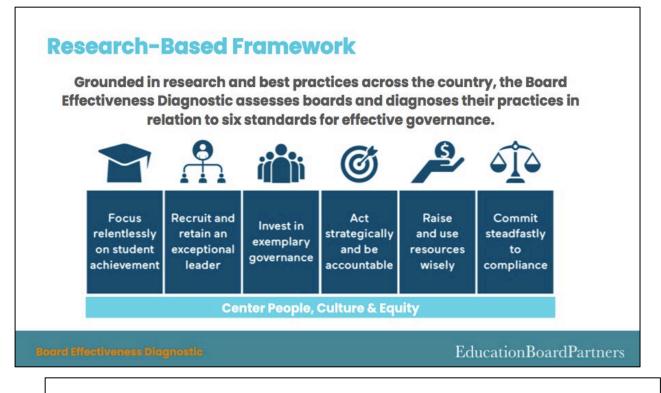
a)	Running a public meeting	-	Each year in June prior to the start of the school year
b)	Nevada State reporting requirements	-	Each year in September prior to mandatory reporting
c)	Specific role of board members	-	Each year prior to assignment on board or committee
d)	Governance vs. management	-	Each year in November
e)	Charter school finance	-	Each year prior to the start of the budget cycle

We believe it is best to outsource this initial board training prior to the commencement of formal board meetings as a way to ensure our board is tightly normed on core operating principles. Also, by leveraging a third party, it provides the necessary level of separation between Rooted School Foundation and the local board ensuring that roles are clearly delineated and adequately defined.

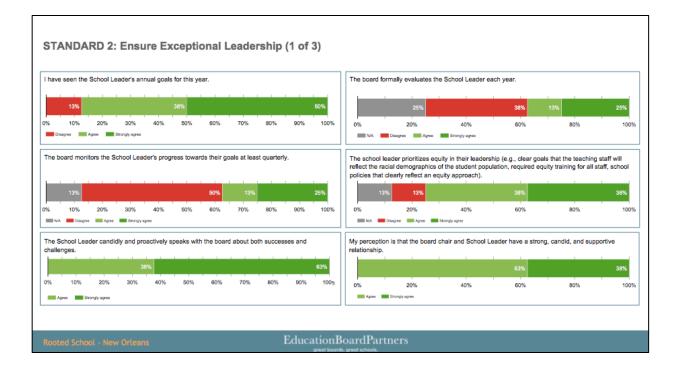


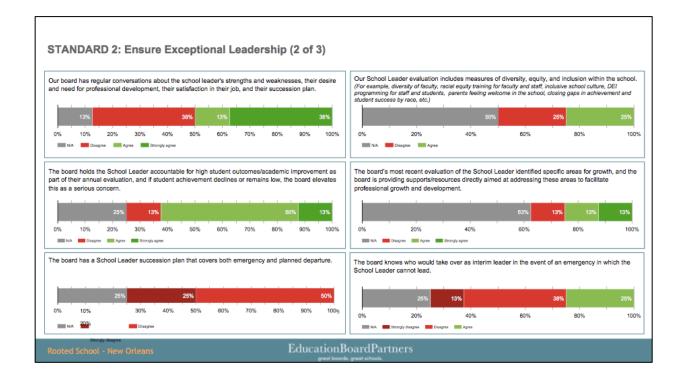
Ongoing board development will be handled by a third-party vendor, (e.g. Board on Track or Education Board Partners, etc.) Excerpts from a recent Board Governance Self-Assessment training with the Rooted School New Orleans board appear below:

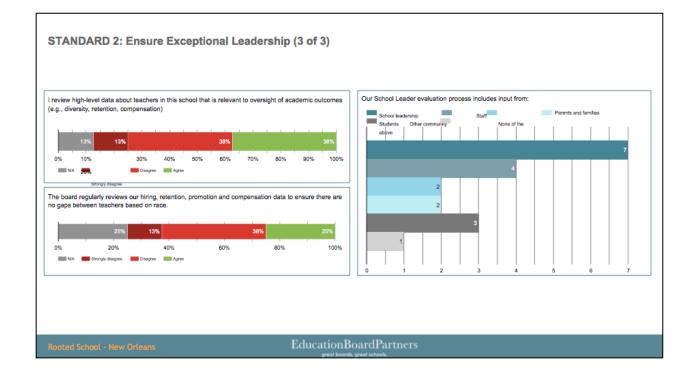


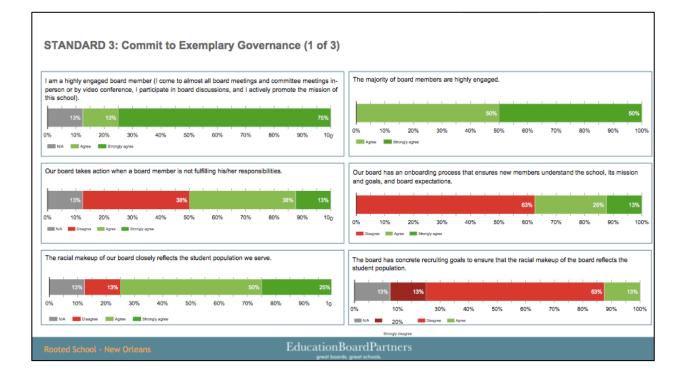


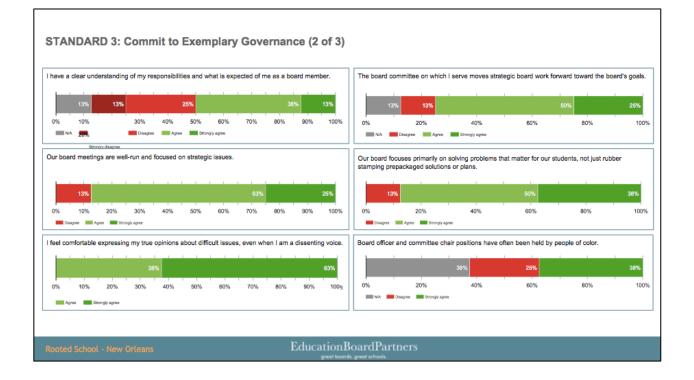
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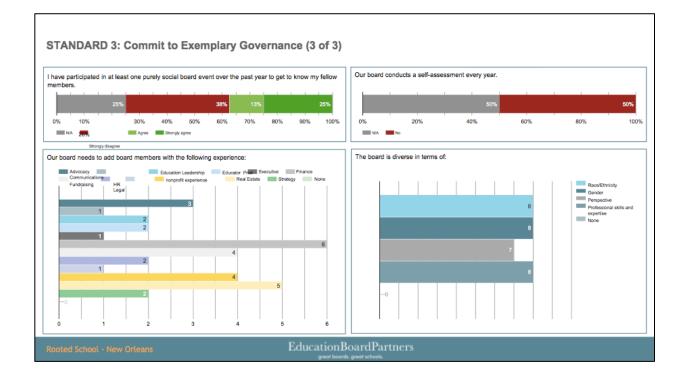


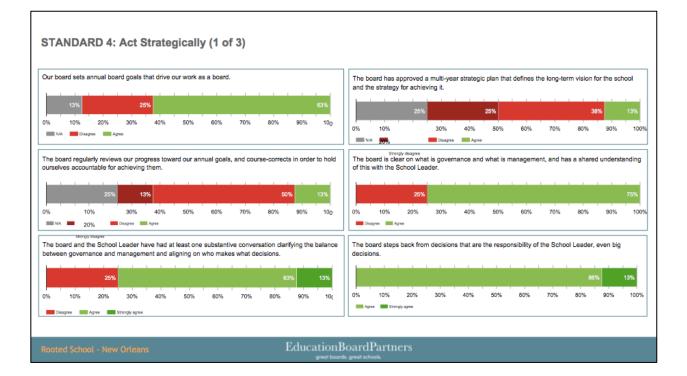


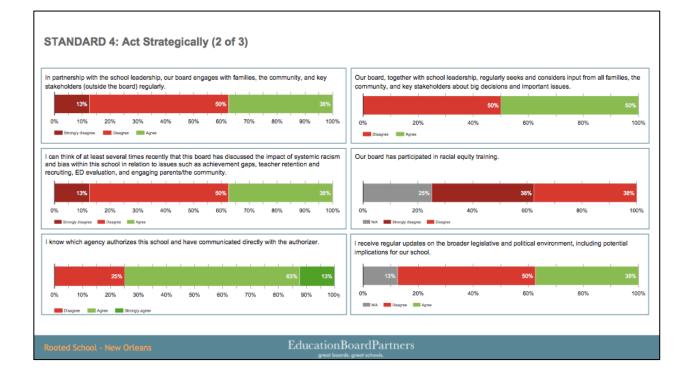


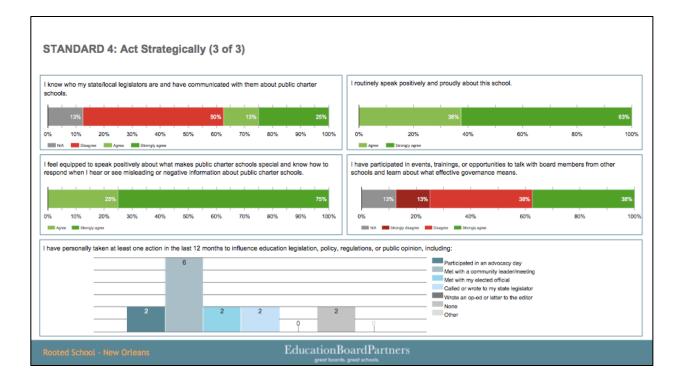


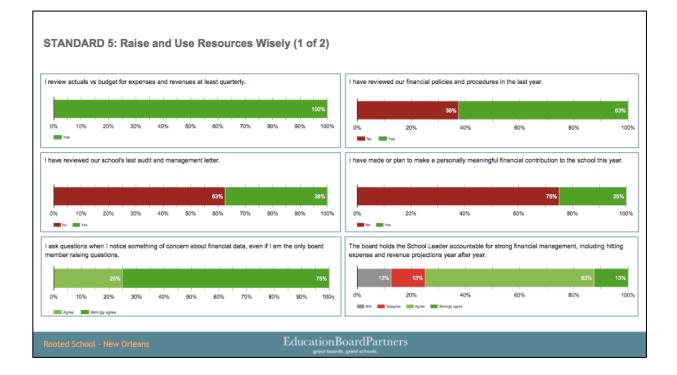




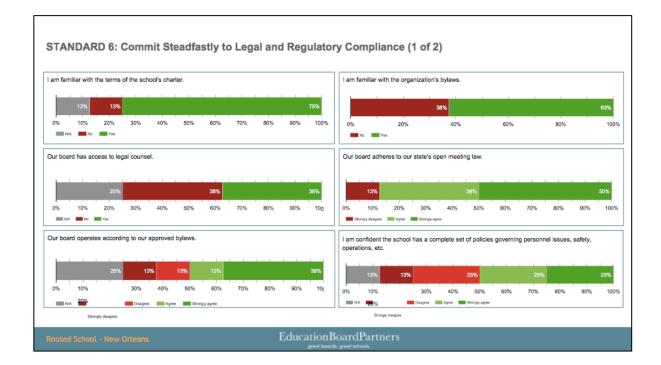








Our board has a full set of financial policies and procedures that protect the school's long-term sustainability. Image: Construction of the school is long-term in the scho	STANDARD 5: Raise	and Use I	Resource	s Wisel	y (2 of 2)
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This training is an example of the commitment from Rooted School Foundation to ensure fully functional, highly effective board oversight and management of the local schools in each region Continuous Board Training:

This will happen both formally and informally. Each year at a board retreat, our outsourced training partner will be contracted to provide both a "refresher course" as well as advanced courses/training as our local board evolves through various cycles (i.e. planning, launch, start-up, and scale).

Informally, Rooted School's CEO will meet individually with each board member between board meetings. In addition to relationship building, this is an opportunity for board members to dig deeper into particular areas of interest:

- Performance Assessment
- Human Resources
- Recruitment
- Community Engagement
- School Discipline
- Governance
- School Leadership & Governance

Summary of Roles and Responsibilities:

RS-CC's board is committed to upholding its fiduciary responsibility while also ensuring that the School Leader has the appropriate autonomy to make decisions that are best for RS-CC's students.

(9) Describe the working relationship between the board and staff (academic, operations, and financial) and the working relationship between the board, staff, and any education management organization. Outline the regular reports that will be provided to the board, their frequency, and who will provide them. This may include financial, operational, and/or or academic reports.

The board's primary role and function will be to:

- Hire and evaluate the school leader
- Evaluate (bi-annually) all RSF delivery of services as outlined in the RSF Service Agreement with RS-CC
- Maintain fiduciary responsibility over budget development, reporting, analysis and spending
- Ensuring compliance with all SPCSA mandates and guidelines
- Reviewing any staff evaluations and/or recommendations as needed or requested by the school leader

The RS-CC board will also be responsible for interacting with the *Industry Advisory Council* (IAC), an advisory body that comprised of technology RS-CC representatives from our industry partners. The IAC will be chaired by a representative from the RS-CC board and supported by the director of career and technical education (CTE). There will be an expectation to meet formally at least once per school year. The results of this session will be shared with RS-CC's board of directors, school leadership and Rooted School Foundation's leadership in a written report.

The board will be expected to meet monthly with Rooted School Foundation (RSF) leadership and to select a member to represent RS-CC on the RSF Advisory Council.

(10) Describe any board committees, advisory bodies, or councils to be formed, including the roles and duties of those bodies. Describe the planned composition; the strategy for achieving that composition; the role of parents, students, and teachers (if applicable); and the reporting structure as it relates to the school's governing body and leadership.

Per its bylaws, RS-CC will retain a board size of five to nine members. The board currently has, and will strive to have, five or more board members. RS-CC has strategically built a high-capacity, diverse 501(c)3 founding charter board comprised of five talented leaders with industry-specific expertise and a community connection.

Critical to RS-CC's model is having a leadership model that is representative of our student population

and reflective of our school's career-connected mission. Notably, four out of five of the founding board members identify as people of color and all five board members have founded and/or lead companies, nonprofits, or businesses.

The proposed board of directors will seek other members with those professional skill sets not represented by school leadership and/or advisor partners. We will seek to recruit members whose expertise complements that of the school-based team and who are local to the Clark County, Nevada region. These new members should also represent the diverse constituencies of the community.

Although the RS-CC board delegates management of the school to the school leader, the board is ultimately responsible for ensuring that the school meets its academic, fiscal and operational objectives.

The duties of RS-CC board members are informed by our Board on Track competencies:

- Safeguard the school's mission and competitive advantage
- Secure sufficient resources to fulfill the school's mission
- Ensure strategic and effective resource allocation
- Hire, support, and assess the performance of the school's leader
- Serve as ambassadors for the organization
- Set equitable policies and procedures
- Assess its own performance
- Behave in ways that clearly contribute to the effective operations of the board
- Be prepared to contribute approximately 8-10 hours per month
- Inform the board of directors of RS-V of any potential conflicts of interest

Job descriptions will contain a final version of the duties listed in the prior section. External audit data such as State Auditors' Office data, non-profit financial audit data, Commission reports and other agency-led evaluations inform board practice the with clear metrics and a pathway to success.

The board will use two assessment tools to evaluate the success of the school, the school leader and its own performance. Starting with the school leader's assessment each July, the school leader and board chair will set annual SMART performance goals for the school.

These will be based on the:

- Nevada charter contract agreements
- Student academic and social-emotional goals
- Diversity and equity goals
- Special Education, 504, ELL and HiCapGoals

We anticipate having at least one parent member representative of an actively enrolled RS-CC student on the board each year. His/her role will be to inform the board through the parent lens and help to drive instructional decisions with the highest degree of transparency and community support.

The board will also assess its own performance annually using the *Board on Track Assessment Tool*, this tool can be accessed anytime by school leadership and any board member(s) wanting to track progress towards goal fulfillment. This real-time dashboard, not only shows stated goals but also key performance indicators that have been gleaned from work with over 100 high performing public and charter schools from across the country.

One of RS-CC's pillars is Community—we never forget where we come from. As such, we will reserve at least one board seat for a current parent/guardian of a student to ensure that all stakeholders, particularly students and parents, have multiple opportunities have their voices heard, provide meaningful input and feedback and to hold a position of formal decision-making power and authority at the governance level. The parent board member will be proposed by the school leader to RS-CC's board of directors within the first two sessions of year 1 and voted on by RSCC's Board of Directors.

Our goal will be to have a majority of our board be comprised of leaders who mirror the racial and ethnic composition of our school. Both principles hold true for all governing boards of existing Rooted Schools. The board will ensure that the school is a culturally responsive education system through coaching and training about leading for equity, cultural humility and creating equity-centered policies and procedures.

(11) Explain the process that the school will follow should a parent or student have an objection to a governing board policy or decision, administrative procedure, or practice at the school.

Procedure for Addressing Parent/Family Concerns at Rooted School—Nevada

We make cultivating and maintaining positive parent/guardian relationships a priority. When a concern arises about the curriculum, a board policy, the school leader, or a RS-CC staff member, we want to respond quickly to find solutions in ways that are culturally responsive and respectful to our stakeholders.

We will follow the following procedure for public complaints, including complaints regarding curriculum, administrative procedure, or a practice at the school:

- Parents/guardians are encouraged to reach out directly to the teacher or staff member with whom they have a concern to set up a meeting.
- Parents/guardians are encouraged to discuss the matter with that staff member and attempt to resolve the concern through the initial meeting.
- If there is no resolution to the concern, parents/guardians should then contact the school leader.
- If the parent/guardian has remaining concerns after discussing the issue with the school leader and the respective staff member(s), the school leader will provide the contact information for the board chair of RS-N.
- Parents and students with grievances related to discrimination, bullying, and/or harassment on the basis of:
 - ✓ Intellectual ability
 - ✓ Race
 - ✓ Color
 - ✓ Religion
 - ✓ Sex or sexual orientation or preference

- ✓ Gender identity or expression
- ✓ Ethnicity
- ✓ National origin or immigration status
- ✓ Disability or identification as an exceptional student

RS-CC commits to following the procedures outlined below:

• They will be afforded the opportunity to present witnesses and be given a written notice of the outcome of the complaint at each stage in the procedure.

• The school will not retaliate against any person who files such a complaint and/or participates in a related investigation in good faith and will keep the investigationconfidential to the extent possible.

Such discrimination, bullying and harassment is not permitted by students, staff or third parties, and the school will make every effort to prevent, remedy and otherwise correct any such behavior that is identified.

All RS-CC complaint procedures are designed to be internally resolved within a timeline of no more than 30 days from the date the complaint was received unless otherwise agreed to by the complainant. Many grievances should be resolved within a shorter timeframe. Since the board is ultimately responsible for school governance, the complaint process ends at the board level. If a matter reaches the board, as complaints against a board policy or decisions about the school leader's performance may, the board will engage in the following steps after receiving and reviewing the complaint:

- Consider the recommendation of the school leader, if applicable to the complaint, and make a decision.
- If the aggrieved is not satisfied with the school leader's recommended course of action, an administrative appeal may be made to the board of directors, specifically the board chair.
- If the grievance is about the performance of the school leader or a decision made by the school leader, the complainant may file to the board chair.
- The chair will confer with the board and may conduct fact-finding or authorize a third-party investigator on behalf of the board. The chair or investigator will report her or his findings to the board for review and action, if necessary.
- The board may take appropriate remedial measures to ensure effective resolution.
- Complaints against an employee by an external stakeholder will follow the same steps with the school leader overseeing the process. In the event that the school leader (or designee) finds that a complaint against an employee is valid, the school leader (or designee) may take appropriate disciplinary action against the employee.
- As appropriate, the school leader (or designee) may also simply counsel/reprimand employees as to their conduct without initiating formal disciplinary measures.
- Translation services are provided when needed throughout these processes. RS-CC anticipates providing translation resources for Spanish and indigenous languages given the school's anticipated student population.
- All complaints respect confidentiality and non-retaliation.

If a complainant regarding the aforementioned areas is not satisfied with the board's response, the complainant may file an appeal to the Nevada State Public Charter School Authority if there is a perceived violation of the charter contract. The school is committed to providing prompt, thoroughand accurate information to the Commission in such cases and will abide by any prescribed corrective action it deems necessary.

(12) What goals will be established for the board and how will board members be held accountable? Outline the key expectations for board members in the table below. You may add rows as appropriate. What actions would trigger removal from the board and under what process?

Goal	Purpose	Outcome Measure
Ensuring adherence to vision/mission	Ensuring fidelity to the Rooted Model and high quality delivery of instruction	• Bi-Annual evaluation of the school leader and school academic growth data
Conduct an annual curriculum audit	Ensuring alignment to NSPF/SPCSA/NGSS/CCSS Framework(s)	 Student growth data continues to trend upward School is on track to earn a four/five start rating
Personnel decisions are transparent and in accordance with board ethical policies and faculty/staff handbook(s)	Selection of School Leader with recommendation of Rooted School Foundation Review of teacher evaluations(See Attachment 11)	 Annual evaluation of school leader using both evaluativetools (See Attachments 10 &12)
Successful, transparent budget development and budget allocations	Develops and approves annual budgetand reviews financials regularly for adherence (See Attachment 19)	 All audits are within compliance with no outstanding findings School continues on a path to fiscal independence by Year-5
Compliance with vendor selection process as outlined inthe Rooted School Policy Handbook	Review all contracts and bid procedures to ensure compliance with federal and Nevada State law	All contracts are awarded in compliance with proper bid procedures and state and locallaws
Annual board retreat with RSF and member of the school's leadership team	Conduct a year-in-review and developany policies to address gaps or deficiencies	 Retreat minutes will be shared with the public Review governance procedures Board development
Attend all board meetings and atleast two Open House /Community Forums annually	Increase community awareness of the school	 Increase the school's visibility Ensure enrollment projectionsfigures are met annually
Conduct a facilities review and update at least two times a year	Maintain a safe orderly facility and student learning environment	 Director of Operations will provide a facility update to thepublic annually as part of a regular board meeting

Possible Removal from the Board:

- Violation or breech of State of Nevada Ethics Code
- Missing 3 or more meetings in any fiscal year without prior approval from the board chair
- Moving out of the state or region
- Demonstrating values that are not mission aligned or board aligned

Any removal from the board would require a vote from the Committee of the Whole.

Approach to Governance

RS-Clark County's approach to governance, like Rooted School—New Orleans, Rooted School—Indianapolis, Rooted School—Vancouver and Rooted School Foundation, will mirror the frameworks provided in *Governance as Leadership: Reframing the Work of Nonprofit Boards*.⁵²

The authors lay out a model for governance that has contributed to Rooted's success to-date:

- **Generative Work:** Board work that focuses on longer-term mission and vision-centricgoals and projects that will inform strategic work in the short-term.
- **Strategic Work:** Board work that work focuses on shorter-term project managementtowards bigger goals. These projects usually take 6–12 months to complete.
- **Fiduciary Work:** Board work that focuses on the day-to-day minutiae of running the school and organization at-large

We understand the need to maintain a clear governance/management line from the charter school's inception. Our board believes that an effective board focuses on results and its skilled leader focuses on the means to get to those results. Thus, we aim to use most of the board's time on strategic and generative work, trusting the school leader and school-based leadership team to manage the day-to-day execution of the Rooted model and report their progress with the board monthly.

During its planning year and first year of operation, RS-CC will contract with *Board on Track* (BoT) as many of RS-CC's governance structures are taken from BoT best practices.

Governance Structure

Rooted School Foundation is a national 501(c)3 nonprofit governed by a national board of five members who are a combination of the following:

- CMO and social impact scale experts
- Funders

⁵²Chait, Richard P., et al. Governance as Leadership Reframing the Work of Nonprofit Board. Wiley, 2004.

• Researchers in regions/communities where Rooted is located.

RS-CC, a Nevada state 501(c)3 nonprofit, will enter an educational partnership agreement with *Rooted School Foundation's* national board. Through that agreement, *Rooted School Foundation* will also stipulate that the local board has the ultimate authority to hire and terminate the local school leader and has the ultimate authority to terminate its agreement with the national group.

This national board determines and executes Rooted's long-term strategies, sets control mechanisms for the organization at-large and advises on the best vehicles for Rooted to grow its desired impact.

The national board will meet quarterly and include an annual strategic planning retreat on the site of a Rooted school. Through selective, foundational training, modeling and coaching, Mr. Johnson and the Rooted School Foundation senior advisors will ensure that the RS-CC board and chair have the skills, capacity and knowledge-base to operate a high-functioning charter school board and hold the school leader accountable within the Rooted model.

Rooted School's Foundation's CEO will manage the RS-CC school leader day-to-day though the local board and will have the final approval in hiring or terminating that leader's employment at Rooted.

The RS-CC school leader will implement the school's mission and report directly to the board on all major, school-related matters. The school leader will present monthly reports at each board meeting reporting on progress made towards academic, financial and operational goals, utilizing the BoT online platform to house board packets and the organization's key performance indicators dashboard. The school leader will be charged with hiring, setting compensation for, supporting, and evaluating all other school staff. The school leader will attend all board meetings and will serve as ex-officio, non-voting board member.

The board will use two assessment tools to evaluate the success of the school, the school leader and its own performance. Starting with the school leader's assessment each July, the school leader and board chair will set annual SMART performance goals for the school.

These will be based on:

- a) Rooted mission
- b) Nevada charter contract
- c) Student academic and social-emotional goals
- d) Diversity and equity goals
- e) Special Education, 504, ELL and High-Capacity Student Goal

The school leader's **SMART** goals will connect with RS-CC's **SMART** goals and be monitored on a *School Leader Scorecard*. Additionally, the leader will be evaluated from the semi-annual *LPI Leadership Practices Inventory* (Individual Feedback Report).

The board will also assess its own performance annually using the *Board on Track Assessment Tool*, this tool can be accessed anytime by school leadership and any board member(s) wanting to track progress towards goal fulfillment. This real-time dashboard, not only shows stated goals but also key performance indicators that have been gleaned from work with over 100 high performing public and charter schools from across the country.

One of RS-CC's pillars is Community—we never forget where we come from. As such, we will reserve at least one board seat for a current parent/guardian of a student to ensure that all stakeholders, particularly students and parents, have multiple opportunities have their voices heard, provide meaningful input and feedback and to hold a position of formal decision-making power and authority at the governance level. The parent board member will be proposed by the school leader to RS-CC's board of directors within the first two sessions of year 1 and voted on by RSCC's Board of Directors.

Our goal will be to have a majority of our board be comprised of leaders who mirror the racial and ethnic composition of our school. Both principles hold true for all governing boards of existing Rooted Schools. The board will ensure that the school is a culturally responsive education system through coaching and training about leading for equity, cultural humility and creating equity-centered policies and procedures.

If board members commit to doing this work themselves, they will have a greater aptitude to hold the school leader and school systems accountable to its goal of equitable outcomes for all students. If disproportionate trends surface during monthly dashboard reviews, the board will ask the school leader to devise a response plan and follow up at subsequent meetings or in ad-hoc committee to ensure that issue is resolved and documented.

A majority vote by all current members is required for board member additions. The governance committee will oversee background checks and new member orientations. The committee will also develop and distribute a board handbook that includes: a board member job description, a performance expectations agreement, committee details and a copy of the school's charter.

Board Member Recruitment

We will take the following actions to identify local leaders who address expertise gaps that exist on the RS-CC board.

- Leveraging Opportunity 180's Board Recruitment Program
- Following up with the following local leaders who have expressed interest in serving on the RS-CC board:
 - a) Justin Pasquale, Attorney at Brandon | Smerber Law Firm (Legal)
 - b) Caleb Dawkins, Banker at J.P. Morgan Private Bank (Finance)
 - c) Crystal Y.C., Managing Partner at Case Law Firm (Legal)

Transition to a Governing Board

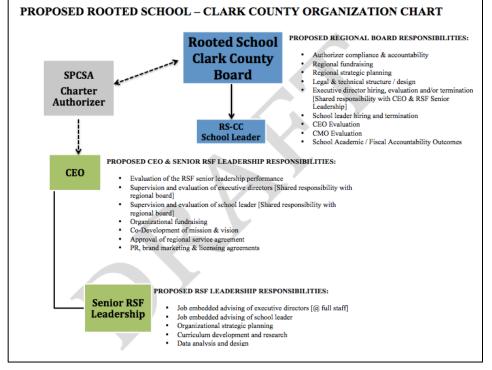
Should RS-CC become authorized, it will transition from a planning to a governing board.

Mr. Johnson, will train the next board chair to lead the board as a strategic body dedicated to long-term operational, financial and academic success of the organization. RS-CC will enter into an educational partnership agreement to be renewed annually with *Rooted School Foundation*, a national non-profit.

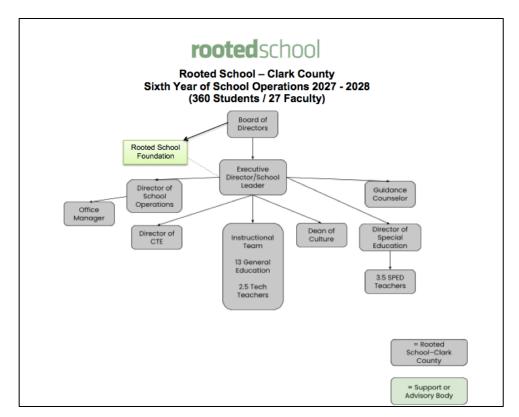
LEADERSHIP TEAM

- (1) Describe the proposed organizational model; include the following information:
 - (a) Organizational charts for year one **and** one for when the school is at full capacity
 - (b) Job descriptions for each leadership role (provide as Attachment 7)
 - (c) Resumes of all current leadership (provide as Attachment 8). NOTE: It is strongly encouraged that high quality school leaders/principals with strong track records of success with the target population be identified for any school which wishes to open in the 2022-23 school year.
 - (d) Previous student achievement data for the individual primarily responsible for academic programming (provide as part of Attachment 9)

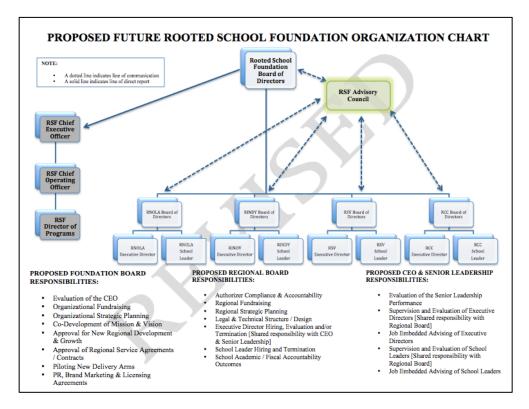
DRAFT ORG CHART ROOTED SCHOOL - CLARK COUNTY YEAR 1



DRAFT ORG CHART ROOTED SCHOOL - CLARK COUNTY YEAR 6 (Full Capacity)



DRAFT ORG CHART ROOTED SCHOOL FOUNDATION



(2) Describe the team's individual and collective qualifications for implementing the school design successfully, including capacity in areas such as:

- (a) School leadership, operations, and governance;
- (b) Curriculum, instruction, and assessment;
- (c) At-risk students and students with special needs;
- (d) Performance management; and
- (e) Parent and community engagement.

Please see table below:

Leadership Competencies	Frank Ingargiola [RSF Chief of Operations]	Jonathan Johnson [CEO]	Kaitlin Karpinski [Rooted School NewOrleans School Leader and RSF Advisor]
School Leadership, Operations & Governance	Yes	Yes	Yes
Curriculum, Instruction & Assessment	Yes	Yes	Yes
Working with Specific StudentPopulation(s): ELL, SPED, HiCap, etc.	Yes	No	Yes
Performance Management	Yes	Yes	Yes
Parent & Community Engagement	Yes	Yes	Yes
Other Key Areas			
Ethics and Professional Norms	Yes	Yes	Yes
Establishing a Community of Care & Support for Students	Yes	Yes	Yes
Human Resources & Capacity of School Personnel	Yes	Yes	Yes
Operations & Management	Yes	No	Yes
Budgeting & Finance	Yes	No	No
Fundraising & CapitalManagement	Yes	Yes	No
School Improvement & DataAnalysis	Yes	Yes	Yes
Professional Development	Yes	Yes	Yes
Meaningful Engagement of Family & Community	Yes	Yes	Yes
Student Recruitment & Retention	No	Yes	Yes
Faculty & Staff Recruitment & Retention	Yes	Yes	Yes

Career Technology Education	Yes	Yes	Yes
Equity & CulturalResponsiveness	Yes	Yes	Yes
School Launch Strategies	Yes	Yes	Yes

Explain how the school leader will be supported, developed, and evaluated. Please include any existing competencies used for school leader selection and evaluation, if available (provide as Attachment 10). Provide, as Attachment 12, your leadership evaluation tool(s), as well as any supporting protocols or documentation.

Support of the school leader and RS-CC comes in the form of the attached RSF agreement (recently amended) below.

SEE ATTACHMENTS 10 & 20.

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provided by RSF will be skilled and trained in the relevant professional discipline for the Services and compliant with all State and federal requirements.

1.8.3 <u>Compliance</u>, RSF acknowledges that this Agreement is subject to the terms of the Charter Contract, other Federal and State laws and policy applicable to charter schools. In providing Services to RS-CC, RSF is responsible for selecting and retaining legal counsel to advise it regarding its responsibilities and obligations under this Agreement, the Charter Contract, and applicable law. RSF agrees that, to the extent applicable to the agreement. Control controls and appreciate law. For agrees that to the extent appreciate to the Services. RSF will comply with the terms and provisions of the Charter Contract and other federal and State laws applicable to charter schools and the performance of the Services. If AS_CC is, at any time, determined to be out of compliance, each party shall promptly provide notice to the other if ume, cetermined to be out of compliance, each party shall promptly provide robtes to the other if and when it has knowledge that RS-CC is out of compliance and RSF shall gromptly cooperate to correct such deficiency and shall participate in any corrective action ban approved by the applicable charter authorizer, the Internal Revenue Service ("IRS") of any other federal or State agency, to remedy such noncompliance to the extent that the doncompliance and corrective action are related to the Services. RSF shall not act, or fail to act, in any manner that may result in breach of the Charter Contract or other laws applicable to diffe Services or operation of the Charter School.

1.8.4 Furnish Information. RSF will timely provide RS-CC with all of the information that may be necessary (i) to fulfall RS-CC's reporting requirements under the Charter Contract; (ii) for the applicable charter authorizer or State or Federal agency's oversight of Charter School operations or RS-CC; and Giii) to comply with the Charter Contract and/or applicable law, including the Internal Resembe Code. Additionally, RS-CC may request, upon reasonable notice, RSF to attend meetings of the Board to provide reports on operations at the Charter School(s), updates on new technols or materials on other matters related to the Services.

1.8.5 <u>Acculations</u> All property or assets acquired by RSF with its own funds in connection with this Agreement shall be owned by and remain the property of RSF.

1.8.6 Communication and Notice. RSF agrees to communicate with RS-CC and timely notify RS CC of any anticipated or known: (i) material health or safety issues; (ii) labor, employee on funding problems; and (iii) problems of any other type that could adversely affect RS-CC on the Charter Contract.

1.8.7 <u>RSF Offices.</u> RSF reserves the right to maintain offices at each Charter School for administrative services at such Charter School, as RSF determines necessary or appropriate. RSF may maintain other offices at other locations.

1.8.8 <u>Other Services</u>. The Services to be provided by RSF to RS-CC under this Agreement comprise only those duties, responsibilities and obligations of RSF expressly stated herein. RSF shall not be obligated to provide any additional or other services to RS-CC except as may be mutually agreed in writing between RSF and RS-CC.

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ARTICLE 2 COMPENSATION

2.1 The School shall pay RSF a fee for Services equal to \$115,500.00 over the Term (as further defined herein) of this Agreement (the "Fee") in accordance with the following APPROVA payment schedule:

Invoice Date	Amount
September 1, 20XX	\$28,875.00
December 1, 20XX	\$28,875.00
March 1, 20XX	\$28,875.00
June 1, 20XX	\$28,875.00

2.2 <u>Invoices</u>. RSF shall submit invoices in accordance with the above payment schedule. Each invoice will include the payment dua date. RSF reserves the right to stop work and terminate this Agreement in writing if an invoke is 45-days or more past due.

2.3 In the event of any material change in the level or scope of RSF's services, the Parties agree to negotiate in good faith an appropriate adjustment to the compensation amount under this Article to reflect the additional or reduced services to be provided by RSF. No material change affecting the compensation amount will be made without the mutual consent of DET and the change affecting the compensation amount will be made without the mutual consent of DET and the change affecting the compensation amount will be made without the mutual consent of DET and the change affecting the compensation amount will be made without the mutual consent of DET and the change affecting the compensation amount will be made without the mutual consent of DET and the change affecting the compensation amount will be made without the mutual consent of DET and the change affecting the compensation amount will be made without the mutual consent of DET and the change affecting the compensation amount will be made without the mutual consent of DET and the change affecting the compensation amount will be made without the mutual consent of DET and the change affecting the compensation amount will be made without the mutual consent of DET and the change affecting the compensation amount will be made without the mutual consent of DET and the change affecting the compensation amount will be made without the mutual consent of DET and the change affecting the compensation amount will be made without the mutual consent of DET and the change affecting the compensation amount will be made without the mutual consent of DET and the change affecting the compensation amount will be made without the mutual consent of DET and the change affecting the compensation amount will be made without the mutual consent of DET and the change affecting the compensation amount will be made without the mutual consent of DET and the change affecting the compensation amount will be made without the mutual consent of DET and the change affect the change affect the RSF and the School. \cup

2.4 The Parties agree that based on a comparison of services to be performed and other organizations available and reported fees, that the compensation fee described above is fair, reasonable, and not excessive.

2.5 <u>RSITs Other Clients</u>. The School acknowledges that RSF may have other school and non-school tilents. RSF shall maintain separate accounts for each client and shall only charge the School for expenses incurred by or on behalf of the School.

ARTICLE 3 EXCLUDED SERVICES

Other than the Services outlined herein, RSF is not responsible for any other 3.1 activities unless mut ally agreed to in writing.

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ARTICLE 4 INSURANCE

4.1 <u>General Liability Insurance</u>. Each Party shall, at its own expense, maintain general liability insurance, including, without limitation, bodily injury and property damage insuring itself with a minimum of \$1,000,000.00 per occurrence and \$2,000,000.00 agregate limit of liability coverage. Each Party shall provide the other Party with a certificate evidencing such insurance and showing the other Party as an additional insured.

4.2 Workers' Compensation Insurance. RSF shall maintain workers' compensation insurance where required by law to cover its employees and shall provide the other Party with a certificate or certificates of such insurance. The cost of such insurance shall be paid as specified herein. herein

4.3 <u>Automobile Insurance</u>. Each Party shall, at the own expense, maintain comprehensive automobile insurance, insuring itself with a minimum of \$1,000,000.00 combined single certificate evidencing such insurance and showing the other Party as an additional insured. 0

4.4 <u>Directors' and Officers' Liability Insurance</u>. The School shall procure and maintain a policy of Directors and Officers' ("DEO") Liability Insurance for the School. Such insurance shall provide a minimum of \$5,000,000,00 coverage.

4.5 <u>Cancellation: Subrogation</u> Each insurance policy required herein shall provide for not less than 10 days written notice to 16 whise Party in the event of cancellation or material change of coverage. To the maximum extent permitted by its insurance policies, each Party, for the benefit of the other Party, wrives, any and all rights of subrogation which might otherwise exist (and the certificate required herein shall indicate such waiver of subrogation). 20

ARTICLE 5 INDEMNIFICATION

5.1 Each Party agrees that the fullest extent permitted by law, it will indemnify, defend, save and hold the other Party, and its directors, officers, employees, agents and other representatives, himmless for, from and against any and all manner of loss, cost, expense (including uttorneys' fees and other costs and expenses of litigation, defense and appeal), damaging right, liability, claims, actions and causes of action whatosever arising from or in any way, related to the indemnifying Party's: (i) negligent or willful acts or omissions; or (ii) breach of the Acreement. way related t

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ARTICLE 6 TRADEMARKS

The Parties' respective rights to use RSF marks are set forth in, and governed by, 61 the attached Trademark Licensing Agreement

> ARTICLE 7 TERM

7.1 Term. Unless earlier terminated as provided herein, the Term of this Agreement shall commence on July XX, 20XX and shall run through June XX, 20XX. RSF: Services shall cease on the termination of this Agreement unless the term of this Agreement is remeved or extended as provided herein. On expiration or termination of this Agreement, regardless of the reason, RSF shall be entitled to, and shall promptly receive, all fees and reinhoursement of all expenses pursuant to Article 2 due and payable through the offective date of expiration or termination.

ARTICLE 8 TERMINATION

8.1 This Agreement may be terminated as follows:

8.1.1 Agreement. Without further liability to either Party, either Party has the right to terminate the Agreement: 1

a. If, at my time, the School determines that this Agreement would serve as grounds for revocation of a Chaiter Contract, would joopardize its tax-exempt status as a Section 501(c)(3) tax-exempt organization, would joopardize the tax exempt status of interest on any debt issued for the basefind for the School, would create adverse tax consequences for the School, or would cause the School to be in violation of applicable law, the School may terminate this Agreement nacconcluser with this Article. The School shall give RSF at least ninety (90) days notice of its infierent to terminate the Agreement pursuant to this Article. In addition, the School shall provade RSF with an analysis as to why such action is necessary. If requested by RSF, the School shall meet and confer with RSF to determine whether some other course of action could 'claken which might satisfy the School concerns and the parties shall work together in good faith to resolve or satisfy any such concerns before a termination is pursued; or

b. If a Party is in breach of a material provision of this Agreement and has failed (a) to cure the breach within sixty (60) days of notice ("Cure Period") from the non-breaching Party specifying the breach or (b) to take substantial steps toward a cure within the Cure Period if the breach is incapable of cure within the Cure Period.

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8.1.2 <u>Non-Appropriation Clause</u>. Without further notice and without further liability to either Party, this Agreement, with respect to any individual and specific charter contract, shall terminate if:

a. The legislature of the applicable jurisdiction fails to appropriate funds for the operation of that charter school. In such an event, the obligations of the Parities with respect to the effected School(s) by the non-appropriation shall terminate on the last due that such government funds are appropriated for the operation of Schools covered by that charter contract: or

b. The School's Charter Contract is revoked or not renewed, or is surrendered after receiving a Notice of Intent to Revoke Charter or Notice of Intent to Non-Renew, by or from the charter authorizing jurisdiction. In such an even, the obligations of the Parties with respect to the effected School(s) shall terminate on the date the Charter Contract expires or on the date of revocation, non-renewal, or surrender, as 'applicable; or the other Party is in breach of a material provision of the Agreement, or a provision of the Agreement that affects only that particular School, and has failed (a) to cure the breach or (b) to the subtactival acutor of a cure and a cure of the three school and the trace of the terms of the term from the non-breaching Party specifying the breach, or (b) to take substantial steps toward a cure within the Cure Period if the breach is incapable of cure within the Cure Period.

c. Severability of Services Provided to Separate Schools. Breach or termination of this Agreement and services to any particular School shall have no effect on any other Schools serviced hereunder, all of which shall remain in force in accordance with their mean-time terms. respective terms.

d. Remedy for Breach of Trademark License Agreement or Copyright License Agreement, ff, at any time, the School breaches the Trademark License Agreement between the School and RSF, and fails to remedy such breach(es) in accordance with the terms of the Trademark License Agreement, RSF may immediately terminate this Services Agreement.

ARTICLE 9 DEFAULT

9.1 Default A "Default" is defined as the failure by a Party to observe, comply with or perform any of the terms, covenants or conditions applicable to such Party under this Agreement, here such Party fails to cure such Default within the applicable grace period specified herein, and shall entitle the non-defaulting Party to pursue the remedies set forth in this Agreement, Specific Defaults and cure periods are set forth below:

9.1.1 The failure by the School to make any payment under this Agreement or to reimburse any cost or expenses as and when due, where such failure continues for a period of 5 calendar days following notice thereof to the School by or on behalf of RSF;

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9.1.2 The failure by either Party to observe, comply with or perform any obligation under this Agreement,

9.1.3 The occurrence of any of the following events: (i) the making by a Party of any general arrangement or assignment for the benefit of creditors; (ii) a Party becomes a "dethce" as defined in 11 U.S. Code Section 101 or any successor statute thereto (unless, in the case of a petition filed against such Party, the same is dismissed within ninety (90) days); (iii) the appointment of a trustee or the judicial appointment of a receiver to take postession of substantially all of a Party's assets, where possession is not restored to such Party'within ninety (90) days; or (iv) the attachment, execution or other judicial seizure of substantially all of a Party's assets, where such seizure is not discharged within ninety (90) days; or

9.1.4 Any action by the School to remove or otherwise limit the authority or role of RSF under the School articles of incorporation or bylaws; or

9.1.5 The failure of the School to timely pay any of its obligations ociated with the construction, acquisition, equipment or recovation of any facilities whether

9.2 <u>Remedies</u>. If either Party defaults hereunder, the non-defaulting Party at its option (but without obligation to do so), perform useh duty or obligation on the defaulting Party's behalf. The costs and expenses of any such performance shall be due and payable by the defaulting Party to the other Party immediates on invoice therefor. In the event of a Default of this Agreement by either Party (which is not timely cured), with or without further notice or demand, the non-defaulting Party under the laws or judicial decision of the State.

ARTICLE 10 GENERAL PROVISIONS 3

10.1 <u>Governing taw.</u> This Agreement and any dispute arising from the performance or breach hereof or thereof shall be governed by, and construed and enforced in accordance with, the laws of the State of Louisiana, without reference to conflicts of laws.

10.2 Notices. All communications and notices relating to this Agreement are to be delivered in writing, with confirmation of delivery, to the following address or another address as either Party may designate from time to time.

If to RSF, then to

Jonathan Johnson Rooted School Foundation 4238 St. Charles Avenue New Orleans, LA 70115

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With a copy to its counsel: Patty McMurray and Melissa Grand Baker Donelson Bearman Caldwell & Berkowitz, PC 450 Laurel Street, 21st Floor Baton Rouge, Louisiana 70801 pmcmurray@bakerdonelson.com mgrand@bakerdonelson.com

jjohnson@rootedschool.org

If to RS-CC, then to:

- APPROVAL With a copy to its counsel:

10.3 <u>Dispute Resolution and Jurisdistion</u>. Unless the parties mutually agree otherwise, any controversy arising out of or relatingto this Agreement or to breach, termination, or validity of this Agreement, may be adjudgended only in a Louisana court, state or federal, having jurisdiction over the subject matter. Both parties consent to the jurisdiction and venue of such a court

court.
10.4 <u>Severability</u>. If the event any provision of this Agreement is found to be invalid, illegal or unenforceable, in any jurisdiction, then in lieu of each such invalid, illegal or enforceable provision there shall be added automatically as a part of this Agreement a valid, legal and enforceable games and all other provisions hereof shall remain in full force and effect in such jurisdiction and shall be aberally construed in order to carry out the intentions of the parties hereto as nearly as may be possible. Such invalidity, illegally or unenforceability shall not affect the validity, legative enforceability of such provision in any other jurisdiction.

10.5 <u>Modification; Waivers</u>. No amendment, modification or waiver of any provision of this Agreement shall be effective unless made in writing signed by all Parties hereto. No provision of this Agreement shall be varied, contradicted or explained by any oral agreement, course of dealing or performance or any other matter not set forth in an agreement in writing and signed by all Parties.

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10.6 <u>Counterparts; Third Party Reneficiaries</u>. This Agreement may be signed in any number of counterparts, each of which shall be an original, with the same effect as if the signatures thereto and hereto were upon the same instrument. This Agreement may be transmitted to the Parties by facisimile or other electronic means, and such signatures transmitted by facsimile or other electronic means, and such signatures transmitted by facsimile or other persunde valid, binding, and of the same force and effect as an original signature to this Agreement. No provision of this Agreement is intended to confer upon any person or entity other than the Parties hereto any rights of regnetics hereunder.

10.7 <u>Assignment</u>. This Agreement may not be assigned by either Party prior written consent of the other Party. out the

10.8 <u>No Implied Waivers: Rights Cumulative</u>. No failure on the part of any Party to exercise and no delay in exercising any right under this Agreement on provided by statute or at law or in equity or otherwise, shall impair, prejudice or constitute awaiver of any such right, nor shall any partial exercise of any such right preclude any other or further exercise thereof or the exercise of any other right.

exercise of any other right.

10.9 <u>Relationship of the Parties.</u>

10.9.1 <u>Independent Contractors</u>. Nothing contained in this Agreement is intended implicitly, or is to be construct do to constitute the Parties as partners or create a jointventure in the legal sense. No Party hereto shall have any express or implied right or authority to assume or create any obligations on behalf of or in the name of any other Party or to bind any other Party to any contract, agreement og undertaking with any third party.

10.9.2 The School designates RSF and its administrators and staff as agents of the School having a legitimate educational interest for the purpose of entitling such persons, (\$12.52) ("ERPA"), and under applicable state law. RSF shall comply with all applicable FERPA and state law requirements.

10.10 <u>School Records</u>. Financial, educational and other records pertaining to the School, whether or not generated or maintained by RSF, are School property, and such records may be subject to tespection and copying under applicable law. School records will be kept and maintained at each School androf on School property. The physical location and access to all reduces of the School shall fully comply with applicable laws. upon expiration or earlier termination of this Agreement, RSF shall, within 30 days, turn over to the School all School records in whatever form (on paper, electronic or otherwise), which shall be retained by the School and thereafter maintained by the Board, RSF may make and keep one copy of all books and records that the School is permitted to retain under applicable law.

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10.10.1 Student Data Privacy; Personally Identifiable Information.

 RSF shall not allow access to, release, or allow the release of student information to any person or entity except as specified in this agreement, or as required by law

b. RSF agrees not to sell, transfer, or process any student information for use in commercial advertising, marketing, or any other commercial purpose, unless otherwise permitted by this agreement, or by federal, state, or local law.

c. RSF agrees to create and maintain access and access authentication policies for its computer system(s) that ensure only authorized individuals have access to student information.

d. Authorized individuals include these authorized by the School and employees or agents of RSF who require access to fulfill the intent of this agreement.

e. RSF agrees to comply with all federal, state, and local laws and regulations related to privacy compliance standards.

f. RSF agrees to provide the results of privacy and security audits on its computer systems that may be required by the School.

g. RSF agrees to put in place safeguards on its computer systems against the breach of student information privacy. In the event of a breach of the privacy of student information, RSF agrees to immediately alert the School and to work with the School to remediate saib breach. remediate said breach.

b. RSF agrees to retain and store student information as required by this agreement with the School and to delete all student information from its computer systems upon termination of this agreement. All information removed from RSF's servers upon termination of this greement will be returned to the School.

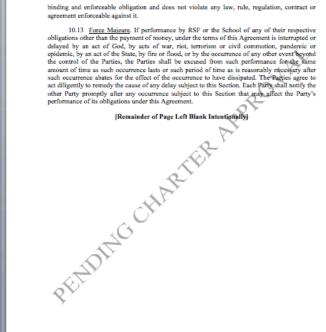
10.11 <u>Initire Agreement</u>. This Agreement embodies the entire understanding between the Parties with respect to the Services and supersedes all previous communications, representations or understandings with respect thereto, either oral or written.

representations or understandings with respect thereto, either oral or written. 10.12 <u>Authority</u>. To the extent that this Agreement is executed by a Party or Parties on behalf, of an individual, corporation, governmental entity, trust, estate or other legal entity, such party or parties executing this Agreement represent that they have authority to act on behalf of the entities or individuals for which they purport to act and to bind those entities or individuals to the terms and conditions of this Agreement. Furthermore, as each Party is a legal entity, each Party acknowledges, represents, warrants and confirms that it has full and complete authorization and power to execute this Agreement in the capacity herein stated, and this Agreement is a valid,

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DRAFT - 04.07.2022 IN WITNESS WHEREOF, the Parties hereto have executed this Agreement on the date ADDENDUM NO. 1 ELARCOL ALTERNATION first writter PENDING CHARTER APPROVAL ADDITIONAL STATE SPECIFIC TERMS 13 Services Agreement Addendum No. 1-1 Services Agreement 4876-3336-2454v1 2958685-000001 03/17/2022

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binding and enforceable obligation and does not violate any law, rule, regulation, contract or agreement enforceable against it.

EXHIBIT A SERVICES

The following objectives and Services will be provided by RSF to RS-CC under the Services Agreer

- Provide the Services below with the following objectives: Α.
 - RS-CC's Board successfully meets its 20XX-20XX school year goals RS-CC's Executive Director successfully meets their 20XX-20XX school b.
 - year goals RS-CC successfully adheres to the Rooted School model articulated in the
 - c. charter contract
- Bi-weekly 30 minute check-in meeting with RS-CC Board Chair or designee В.
- C. Weekly 60 minute check-in with RS-CC Executive Director
- D. Attend monthly RS-CC Board meeting (virtually or in-person at RSF's option)
- Assist with Board meeting and agenda pregnantion and other aspects of Board meeting design, including posting Board meeting notice and meeting minutes E.
- Manage Board on Track or similar platform F.
- G.
- H.
- Strategize with RS-CC Board members regarding agenda items Plan and coordinate annual Board retreat and plan professional development/strategic planning opportunities offered at retreat including:
 - Shared training with a third party vendor specializing in board governance and board development
 - Board cevelopment
 Board president training and consulting
 Regional board compliance training and professional development
 Professional development and training on applicable state public records
 - and open meetings act requirements Professional development and training in Roberts Rules of Order as they pertain to public school meetings
 - Provide ongoing fundraising assistance and grant writing services including:
 - 1. Charter School Growth Fund relationship manageme

 - 2. RSF will use best efforts to assist with securing lending partner(s) for facility, but does not guarantee fundraising efforts will be successful

Exhibit A-1

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- Grant consulting and RFP search services 3.
- 4. Grant writing assistance, which includes but is not restricted to ongoing engagement with Ruth Richerson Consulting

Costs and expenses for (1) services provided by outside fundraisers, (ii) fundraising costs including but not limited to the costs of printing brochures, hosting events, and travel, are not included in RSF's Fee.

- L Authorizer relationship management
 - Assist RS-CC with meeting compliance expectations of the authorizer. RS-CC is ultimately responsible for maintaining full compliance with its charter authorizer. i.
- Assist with recruiting and developing school leadership and faculty by: К.
 - Providing leadership training and professional development. RS-CC is ultimately responsible for training its staff to meet performance expectations set by the authorizer and school Board of Directors. Providing instructional training and professional development RS-CC is a.
 - Ъ. Providing instructional training and professional development RS-CC is ultimately responsible for training its staff to meet performance expectations set by the authorizer and school Board of Directors. Providing the opportunity for shared staff/faculty training with other regions at RSF-sponsored retreats. Providing professional development on distance learning platforms and SIS platforms RS-CC is ultimately responsible for training its staff to meet performance expectations set by the authorizer and school Board of Directors.
 - d.

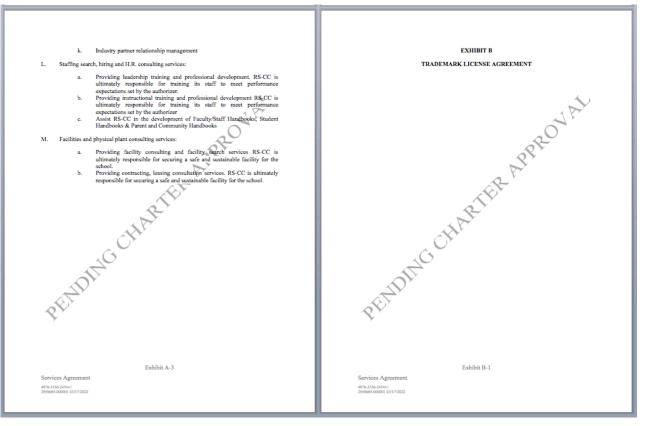
 - Project/Based Learning and all state approved industry-based credentials (BE®s) RS-CC is ultimately responsible for creating and executing a curriculum that is aligned to the approved school charter submitted by Rooted School Foundation.
 - Rooted School Foundation. Coaching and consulting around local CTE requirements and credentialing RS-CC is ultimately responsible for creating and executing a curriculum that is aligned to the approved school charter submitted by Rooted School Foundation.
 - Coaching and consultation around fiscal planning and budget development. RS-CC is ultimately responsible for the budget it develops nd approves.
 - and approves. Coaching, consultation, and on the ground support to reach recruitment targets. RS-CC is ultimately responsible for meeting its enrollment goals. Identifying Industry Based Credentials that are in demand by high-
 - growth/high-wage employers Managing the Industry Advisory Council (IAC)
 - Exhibit A-2

Services Agreement 4876-3336-2454v1 2958685-000001 03/17/2022

h.

i.

j.



(3) Explain your school leader's role in providing instructional guidance and school culture guidance. What role will other members of the leadership team play in providing instructional guidance and school culture guidance?

Instructional Guidance:

The Rooted School Leader is expected to be the academic leader of his/her building. The individual selected to fulfill this role will have the responsibility of providing Tier I curriculum and oversight of the full instructional program.

As no one administrator could possibly hold the expertise needed for all content areas at the high school level, Rooted School Vancouver will rely on curriculum development and alignment training from RSF as well as already existing Rooted School regions.

It should be noted that all curriculum will be thoroughly vetted to align with the Nevada Academic Content Standards as outlined by *State of Nevada Department of Education* (https://doe.nv.gov/Nevada Academic Content Standards/)

Please see *sample* Scope & Sequences, Unit Plans & Lesson Plan (U.S. History I & Biology I) below:

ROOTED SCHOOL

US History I – Scope & Sequence / Curriculum Map

1st Quarter (August - November) 2nd Quarter (November - February) 3rd Quarter (February - April) 4th Quarter (April - June)

Unit	Topics	Content Theme Standards
Unit 1: Industrialization & Expansion through the Progressive Era	Topic 1: Western Expansion into Closing of the Frontier Topic 2: Urbanization and Industrialization Topic 3: Progressivism and Its Impact	SS.9-12.US.14, SS.9-12.US.15, SS.9- 12.US.16, SS.9-12.US.26, SS.9- 12.US.27, SS.9-12.US.28, SS.9- 12.US.30, SS.9-12.US.32, SS.9- 12.US.33, SS.9-12.US.35, SS.9- 12.US.37, SS.9-12.US.39, SS.9- 12.US.40, SS.9-12.US.41, SS.9- 12.US.43, SS.9-12.US.44
Unit 2: Foreign Policy through World War I	Topic 1: US Imperialism before 1917 Topic 2: WWI and Its Aftermath	SS.9-12.US.15, SS.9-12.US.23, SS.9- 12.US.24, SS.9-12.US.25, SS.9- 12.US.26, SS.9-12.US.27, SS.9- 12.US.34, SS.9-12.US.36, SS.9- 12.US.37, SS.9-12.US.39, SS.9-

		12.US.42, SS.9-12.US.44, SS.9-
		12.US.45
	Topic 1: American Prosperity	SS.9-12.US.13, SS.9-12.US.15, SS.9-
	and Social Change	12.US.18, SS.9-12.US.19, SS.9-
	Topic 2: Global Depression	12.US.20, SS.9-12.US.26, SS.9-
Unit 3:		12.US.28, SS.9-12.US.31, SS.9-
	Topic 3: The New Deal	12.US.34, SS.9-12.US.35, SS.9-
Growth and Decline		12.US.36, SS.9-12.US.37, SS.9-
Between Wars		12.US.39, SS.9-12.US.40, SS.9-
		12.US.41, SS.9-12.US.42, SS.9-
		12.US.43, SS.9-12.US.44, SS.9-
		12.US.45
	Topic 1: The Crisis in Europe	SS.9-12.US.15, SS.9-12.US.17, SS.9-
	and American Entry	12.US.23, SS.9-12.US.24, SS.9-
Unit 4:	Topic 2: The US During WWII	12.US.25, SS.9-12.US.26, SS.9-
	Topic 3: Victory and	12.US.34, SS.9-12.US.35, SS.9-
World War II	Outcomes of WWII	12.US.37, SS.9-12.US.39, SS.9-
		12.US.42, SS.9-12.US.43, SS.9-
		12.US.44
	Topic 1: The Cold War at	SS.9-12.US.13, SS.9-12.US.14, SS.9-
	Home and Abroad	12.US.15, SS.9-12.US.17, SS.9-
	Topic 2: Conflict and Social	12.US.18, SS.9-12.US.19, SS.9-
	Movements	12.US.23, SS.9-12.US.24, SS.9-
Unit 5:	Topic 3: The End of the Cold	12.US.25, SS.9-12.US.26, SS.9-
onit 5.	War	12.US.27, SS.9-12.US.28, SS.9-
The Cold War Era		12.US.29, SS.9-12.US.30, SS.9-
		12.US.33, SS.9-12.US.34, SS.9-
		12.US.36, SS.9-12.US.37, SS.9-
		12.US.38, SS.9-12.US.41, SS.9-
		12.US.42, SS.9-12.US.43, SS.9-12.US.4,
		SS.9-12.US.45
	Topic 1: Crisis and Conflicts:	SS.9-12.US.13, SS.9-12.US.14, SS.9-
	US and Middle East Relations	12.US.15, SS.9-12.US.17, SS.9-
Unit 6:	Topic 2: Presidential	12.US.19, SS.9-12.US.20, SS.9-
Entoring a New Er	Administrations in the New	12.US.21, SS.9-12.US.22, SS.9-
Entering a New Era	Era	12.US.23, SS.9-12.US.24, SS.9-
		12.US.25, SS.9-12.US.26, SS.9-
	Topic 3: Issues in Nevada and	12.US.27, SS.9-12.US.28, SS.9-

12.US.30, SS.9-12.US.31, SS.9-
12.US.32, SS.9-12.US.33, SS.9-
12.US.34, SS.9-12.US.36, SS.9-
12.US.37, SS.9-12.US.40, SS.9-
12.US.42, SS.9-12.US.43, SS.9-12.US.4,
SS.9-12.US.45

Unit 1		Supplements
Unit 1: Ind Progressi	lustrialization & Expansion through the ve Era	DBQ Project:
a nation's	Question: How do innovation and expansion affect identity? th: (4-6 weeks)	The Philanthropy of Andrew Carnegie: Did it make him a hero?
Days) Topic 2: U Topic 3: P Disciplina throughou SS.9-12.US	Vestern Expansion into Closing of the Frontier (10 Trbanization and Industrialization (11 Days) rogressivism and Its Impact (7 Days) Try Skill Standards addressed within daily lesson t the unit: SS.9-12.US.1, SS.9-12.US.2, SS.9-12.US.3, 5.4, SS.9-12.US.5, SS.9-12.US.6, SS.9-12.US.7, SS.9- 5.9-12.US.9, SS.9-12.US.10	Progressivism: Where will you put your million dollars?
Content Theme Standards		Key Concepts
History	 SS.9-12.US.14 Evaluate the impact of individuals and reform movements on the struggle for greater civil rights and liberties throughout US History SS.9-12.US.15 Evaluate the factors that shape group and national identity and how the American identity has evolved SS.9-12.US.16 Interpret events from a variety of historical and cultural perspectives, including but not limited to: suffragettes, civil rights activists, 	 Assimilation Chinese Exclusion Act Exodusters Battles with Plains Indians Dawes Act Homestead Act End of the open range Transcontinental railroad Agrarian Movement Populism Mass Production

	notionalista una gragoine litical - sticist	A 11 T
	nationalists, progressives, political activists,	 Assembly Line Menopolies
	immigrant groups	MonopoliesTrusts
	SS.9-12.US.26 Examine how and why diverse	Horizontal/Vertical
	groups have been denied equality and	Integration
Multi-	opportunity, both institutionally and informally	Industrial Giants
Cultural	SS.9-12.US.27 Analyze how resistance	• "new" immigrants
Cultural	movements organized and responded to	• Push/pull factors of
	.	immigration
	oppression and infringement of civil liberties, and	
	evaluate the impact of the responses. SS.9-12.US.28 Examine how American culture is	Settlement Housing
		• Tenements
	influenced and shaped by diverse groups and	 Political machines Anti-Trust laws
	individuals	Anti-Trust lawsLabor unions
	SS.9-12.US.30 Discuss the contributions of	 Strikes / boycotts
	racially and ethnically diverse leaders to the	Conservation
	advancement of the US	Triangle Shirtwaist Factory
	SS.9-12.US.32 Examine the changing roles,	Fire
Civics	impact, and power of political leaders, parties,	Child labor
	and voting blocs over time.	Social reformers
	SS.9-12.US.33 Compare the evolution of different	Muckrakers
	political, civil, religious, and economic	• IT use buseling
	institutions and their influence on individuals,	• Voting reforms / legislation
	communities, and government policies	
	throughout US history	
	un oughout 05 mistory	
	SS.9-12.US.35 Explain how American identity is	
	shaped by founding documents, political	
	participation, democratic institutions, and the	
	interactions among diverse cultures.	
	SS.9-12.US.37 Analyze major political policies	
	and landmark Supreme Court cases and their	
	impact on US History	
Coordinate	SS.9-12.US.39 Create, interpret, and utilize maps	
Geography	that display and explain the geo-spatial patterns	
	of cultural, economic, political, and	
	environmental characteristics	

	SS.9-12.US.40 Analyze how and why the US landscape has changed as people adapted the
	environment to meet their needs.
	SS.9-12.US.41 Analyze how diffusion of ideas, technologies, and cultural practices have influenced migration and immigration patterns and the distribution of human population throughout US History
	SS.9-12.US.43 Examine the effect of individuals, communities, businesses, and government on the economic policies and decisions of the US over time
Economics	SS.9-12.US.44 Evaluate multiple factors that impact the US economy over time, including but not limited to: trade, resources, labor and monetary system

Unit 2	Supplements
 Unit 2: Foreign Policy through World War I Essential Question: How can world conflict redefine how a nation identifies itself? Unit Length: (3-4 weeks) Topic 1: US Imperialism before 1917 (10 days) Topic 2: WWI and Its Aftermath (11 days) 	DBQ Project: Should the US have annexed the Philippines?
Disciplinary Skill Standards addressed within daily lesson throughout the unit: SS.9-12.US.1, SS.9-12.US.2, SS.9-12.US.3, SS.9-12.US.4, SS.9-12.US.5, SS.9-12.US.6, SS.9-12.US.7, SS.9- 12.US.8, SS.9-12.US.9, SS.9-12.US.10	What Were the Underlying Causes of the Tulsa Race Massacre?
Content Theme Standards	Key Concepts

History	 SS.9-12.US.15 Evaluate the factors that shape group and national identity and how the American identity has evolved. SS.9-12.US.23 Evaluate the use of conflict and diplomacy in international relations from a US perspective. SS.9-12.US.24 Analyze the causes, impacts, and attitudes towards conflict and war from various points of view throughout US history. SS.9-12.US.25 Analyze the reciprocal nature of international relations as the US and other governments interact and influence one another. 	 Social Darwinism Yellow Journalism Annexation of Hawaii Spanish-American War Panama Canal Great White Fleet Anti-Imperialist League Open Door Policy Roosevelt Corollary Types of Diplomacy (big stick, dollar, moral) Banana republics Boxer Rebellion Philippine Insurrection Mexican Revolution Alliances Assassination of Archduke
Multi- Cultural	 SS.9-12.US.26 Examine how and why diverse groups have been denied equality and opportunity, both institutionally and informally. SS.9-12.US.27 Analyze how resistance movements organized and responded to oppression and infringement of civil liberties, and evaluate the impact of the responses. 	 Assassination of Archduke Franz Ferdinand Imperialism Nationalism Militarism Lusitania Unrestricted Submarine Warfare Sussex Pledge Zimmerman Telegram Liberty Bonds Victory Gardens Espionage and Sedition Acts Schenk vs US Trench warfare Bolshevik Revolution Fourteen Points League of Nations War Guilt Clause
Civics	 SS.9-12.US.34 Analyze the effects of media in shaping public perception and policies throughout US History. SS.9-12.US.36 Explain the historical background of a current national issue and propose a course of action to solve it. SS.9-12.US.37 Analyze major political policies and landmark Supreme Court cases and their impact on US History 	
Geography	SS.9-12.US.39 Create, interpret, and utilize maps that display and explain the geo-spatial patterns of cultural, economic, political, and environmental characteristics	

Economics	 SS.9-12.US.42 Explain how global circumstances and interaction affect resources, land use, culture, and population distribution in the US. SS.9-12.US.44 Evaluate multiple factors that impact the US economy over time, including but not limited to: trade, resources, labor and monetary system. SS.9-12.US.45 Evaluate the US's role and responses to globalization and the impact on the US economy, including trade policy, embargoes, exchange rates, and trade agreements. 	
	Unit 3	Supplements
Essential nation's id Unit Leng Topic 1: A Topic 2: (Topic 3: 7 Disciplina throughou SS.9-12.US	rowth and Decline Between Wars Question: What is the legacy of war and recovery on a lentity? sth: (3-5 weeks) American Prosperity and Social Change (7 days) Global Depression (6 days) The New Deal (7 days) The New Deal (7 days) ary Skill Standards addressed within daily lesson at the unit: SS.9-12.US.1, SS.9-12.US.2, SS.9-12.US.3, S.4, SS.9-12.US.5, SS.9-12.US.6, SS.9-12.US.7, SS.9- S.9-12.US.9, SS.9-12.US.10	DBQ Project: Prohibition: Why did America change its mind? What Caused the Great Depression?
Content Theme Standards		Key Concepts
History	 SS.9-12.US.13 Investigate the causes and effects of diverse ideologies on politics, society, and culture. SS.9-12.US.15 Evaluate the factors that shape group and national identity and how the American identity has evolved. SS.9-12.US.18 Examine the causes and effects of socioeconomic diversity throughout US History 	 Great Migration Harlem Renaissance Jazz Age Changing role of women Flappers Bootlegging Prohibition 18th amendment

Multi- Cultural	 SS.9-12.US.19 Analyze the impact of religious, intellectual, and artistic changes throughout the course of US History SS.9-12.US.20 Explore how individuals and events in Nevada's history both influence and are influenced by the larger national context SS.9-12.US.26 Examine and explore the ways in which diverse groups have been denied equality and opportunity, both institutionally and informally, at various times throughout US History SS.9-12.US.28 Examine how American culture is influenced and shaped by diverse groups and individuals SS.9-12.US.31 Analyze the intellectual, cultural, religious, and artistic contributions of diverse individuals in the US. to the modern world. 	 First Red Scare Immigration quotas Palmer Raids Nativism Sacco and Vanzetti Case Jim Crow Laws Ku Klux Klan "Return to Normalcy" Scopes Trial Consumerism Advertisement Electrical appliance Growth of national culture Buying on credit Speculation Smoot-Hawley Tariff Bonus Army Hoover Dam Stock Market Crash Black Friday
Civics Geography	 SS.9-12.US.34 Analyze the effects of media in shaping public perception and policies throughout US History. SS.9-12.US.35 Explain how American identity has been shaped by founding documents, political participation, democratic institutions, and the interactions among diverse cultures throughout US History SS.9-12.US.36 Explain the historical background of a current national issue and propose a course of action to solve it. SS.9-12.US.37 Analyze major political policies and landmark Supreme Court cases and their impact on US History SS.9-12.US.39 Create, interpret, and utilize maps that display and explain the geo-spatial patterns of cultural, economic, political, and environmental characteristics 	

	 SS.9-12.US.40 Analyze how and why the US landscape has changed as people adapted the environment to meet their needs SS.9-12.US.41 Analyze how diffusion of ideas, technologies, and cultural practices have influenced migration and immigration patterns and the distribution of human population throughout US History.
	SS.9-12.US.42 Explain how global circumstances and interaction affect resources, land use, culture, and population distribution in the US.
	SS.9-12.US.43 Examine the effect of individuals, communities, businesses, and government on the economic policies and decisions of the US over time.
Economics	SS.9-12.US.44 Evaluate multiple factors that impact the US economy over time, including but not limited to: trade, resources, labor and monetary system.
	SS.9-12.US.45. Evaluate the US's role and responses to globalization and the impact on the US economy, including trade policy, embargoes, exchange rates, and trade agreements.

Unit 4	Supplements
Unit 4: World War II Essential Question: What is the role of war in nation building? Unit Length: (3-4 weeks)	DBQ Project:
Topic 1: The Crisis in Europe and American Entry (7 days) Topic 2: The US During WWII (5 days) Topic 3: Victory and Outcomes of WWII (7 days)	Why Did Japan Attack Pearl Harbor?

-	y Skill Standards addressed within daily lesson	Did President Truman Make			
throughout the unit: SS.9-12.US.1, SS.9-12.US.2, SS.9-12.US.3,		the Right Decision to Drop the			
SS.9-12.US.4, SS.9-12.US.5, SS.9-12.US.6, SS.9-12.US.7, SS.9-		Atomic Bombs on Japan?			
12.US.8, SS.9	12.US.8, SS.9-12.US.9, SS.9-12.US.10				
	Content Theme Standards	Key Concepts			
History	 SS.9-12.US.15 Evaluate the factors that shape group and national identity and how the American identity has evolved. SS.9-12.US.17 Investigate the evolution of gender roles and equality within social and economic life in the US SS.9-12.US.23 Evaluate the use of conflict and diplomacy in international relations from a US perspective. SS.9-12.US.24 Analyze the causes, impacts, and attitudes towards conflict and war from various points of view throughout US history. SS.9-12.US.25 Analyze the reciprocal nature of international relations as the US and other governments interact and influence one another. 	 Facism Appeasement Munich Conference Axis Powers Non-Aggression Pact Isolationism Neutrality Acts Lend-Lease Act Pearl Harbor Deficit spending Rosie the Riveter Propaganda Rationing Double V Campaign Code Talkers Tuskegee Airmen Japanese Internment <i>Korematsu vs US</i> 			
Multi- Cultural	SS.9-12.US.26 Examine and explore the ways in which diverse groups have been denied equality and opportunity, both institutionally and informally, at various times throughout US History	 Pacific Theater European Theater North Africa Campaign D-Day Island Hopping 			
Civics	 SS.9-12.US.34 Analyze the effects of media in shaping public perception and policies throughout US History. SS.9-12.US.35 Explain how American identity has been shaped by founding documents, political participation, democratic institutions, and the interactions among diverse cultures throughout US History SS.9-12.US.37 Analyze major political policies and landmark Supreme Court cases and their impact on US History 	 Island Hopping Kamikaze pilots Manhattan Project Atlantic Charter War conferences Holocaust Nuremburg Trials United Nations 			

Geography	 SS.9-12.US.39 Create, interpret, and utilize maps that display and explain the geo-spatial patterns of cultural, economic, political, and environmental characteristics SS.9-12.US.42 Explain how global circumstances and interaction affect resources, land use, culture, and population distribution in the US.
Economics	 SS.9-12.US.43 Examine the effect of individuals, communities, businesses, and government on the economic policies and decisions of the US over time. SS.9-12.US.44 Evaluate multiple factors that impact the US economy over time, including but not limited to: trade, resources, labor and monetary system.

Unit 5	Supplements
Unit 5: The Cold War Era Essential Question: Is a nation defined by its foreign policy? Unit Length: (7-9 weeks)	DBQ Project:
Topic 1: The Cold War at Home and Abroad (15 days) Topic 2: Conflict and Social Movements (15 days) Topic 3: The End of the Cold War (6 days)	From Allies to Enemies: Why did the Cold War begin?
Disciplinary Skill Standards addressed within daily lesson throughout the unit: SS.9-12.US.1, SS.9-12.US.2, SS.9-12.US.3, SS.9- 12.US.4, SS.9-12.US.5, SS.9-12.US.6, SS.9-12.US.7, SS.9-12.US.8, SS.9-12.US.9, SS.9-12.US.10	Berlin, Korea and Cuba: How did the US contain communism?
	Politics or Principle: Why did LBJ sign the Civil Rights Act of 1964
Content Theme Standards	Key Concepts

History	 SS.9-12.US.13 Investigate the causes and effects of diverse ideologies on politics, society, and culture. SS.9-12.US.14 Evaluate the impact of individuals and reform movements on the struggle for greater civil rights and liberties throughout US History. SS.9-12.US.15 Evaluate the factors that shape group and national identity and how the American identity has evolved. SS.9-12.US.17 Investigate the evolution of gender roles and equality within social and economic life in the US SS.9-12.US.18 Examine the causes and effects of socioeconomic diversity throughout US History SS.9-12.US.19 Analyze the impact of religious, intellectual, and artistic changes throughout the course of US History SS.9-12.US.23 Evaluate the use of conflict and diplomacy in international relations from a US. perspective. SS.9-12.US.24 Analyze the causes, impacts, and attitudes towards conflict and war from various points of view throughout US History. SS.9-12.US.25 Analyze the reciprocal nature of international relations as the US and other governments interact and influence one another 	 Vietnam War VietCong Gulf of Tonkin Ho Chi Minh Trail My Lai Massacre Anti-War Protests
	another. SS.9-12.US.26 Examine and explore the ways	NAACP SCLC
Multi-Cultural	in which diverse groups have been denied equality and opportunity, both institutionally and informally, at various times throughout US History	 SNCC Brown vs Board of Education Massive Resistance Little Rock Nine Civil Disobedience Freedom Rides Encodom Summor
	SS.9-12.US.27 Analyze how resistance movements have organized and responded to	 Freedom Summer 24th Amendment

	oppression and infringement of civil liberties, and evaluate the impact of the responses. SS.9-12.US.28 Examine how American culture is influenced and shaped by diverse groups and individuals SS.9-12.US.29 Investigate and apply the successful principles of groups in US history in order to create communities of respect, equity, and diversity at the school and local level. SS.9-12.US.30 Discuss the contributions of racially and ethnically diverse leaders to the advancement of our community and nation	 Civil Rights Act 1964 Selma Marches Voting Rights Act 1965 Black Panther Party Race Riots Equal Rights Amendment National Organization of Women
	 SS.9-12.US.33 Compare the evolution of different political, civil, religious, and economic institutions and their influence on individuals, communities, and government policies throughout US History SS.9-12.US.34 Analyze the effects of media in shaping public perception and policies throughout US History. 	
Civics	 SS.9-12.US.36 Explain the historical background of a current national issue and propose a course of action to solve it. SS.9-12.US.37 Analyze major political policies and landmark Supreme Court cases and their impact on US History SS.9-12.US.38 Evaluate the social, political, and economic changes that have impacted the interpretation of the Constitution and evolution of law throughout US History 	
Geography		

	 SS.9-12.US.41 Analyze how diffusion of ideas, technologies, and cultural practices have influenced migration and immigration patterns and the distribution of human population throughout US History. SS.9-12.US.42 Explain how global circumstances and interaction affect resources, land use, culture, and population distribution in the US.
Economics	 SS.9-12.US.43 Examine the effect of individuals, communities, businesses, and government on the economic policies and decisions of the US over time. SS.9-12.US.44 Evaluate multiple factors that impact the US economy over time, including but not limited to: trade, resources, labor and monetary system. SS.9-12.US.45. Evaluate the US's role and responses to globalization and the impact on the US economy, including trade policy, embargoes, exchange rates, and trade agreements.

	Unit 6	Supplements
Unit 5: Ente	ring a New Era	DBQ Project:
Essential Qu	testion: What defines us as a modern nation: domestic	
policy or the	threat of terror?	
Unit Length	: (6-8 weeks)	Should the US Drill for Oil in
		Alaska's Wilderness?
-	sis and Conflicts: US and Middle East Relations (6 days)	
=	sidential Administrations in the New Era (10 days)	
Topic 3: Issu	ies in Nevada and the US (15 days)	What Were the Consequences of
		9/11?
	7 Skill Standards addressed within daily lesson	5/11.
•	he unit: SS.9-12.US.1, SS.9-12.US.2, SS.9-12.US.3, SS.9-	
	-12.US.5, SS.9-12.US.6, SS.9-12.US.7, SS.9-12.US.8, SS.9-	
12.05.9, 55.9	-12.US.10, SS.9-12.US.11, SS.9-12.US.12	
	Content Theme Standards	Key Concepts
	SS.9-12.US.13 Investigate the causes and effects of	Watergate
	diverse ideologies on politics, society, and culture.	Clinton Impeachment
	SS.9-12.US.14 Evaluate the impact of individuals	AIDS epidemic
	and reform movements on the struggle for greater	Contract with America
	civil rights and liberties throughout US History.	• 2000 Election
		Human Genome Project
	SS.9-12.US.15 Evaluate the factors that shape group	8 8
	and national identity and how the American identity has evolved.	Oil/Energy CrisisIran-Contra Affair
	SS.9-12.US.17 Investigate the evolution of gender	Camp David Accords
History	roles and equality within social and economic life in	 NAFTA
	the US	Kyoto Protocol
		Affirmative Action
	SS.9-12.US.19 Analyze the impact of religious,	• War on Drugs
	intellectual, and artistic changes throughout the	Immigration Policy
	course of US History	Internet/Technology
		Affordable Care Act
	SS.9-12.US.20 Explore how individuals and events	LGBTQ Rights/Legislation The Creat Decession
	in Nevada's history both influence and are influenced by the larger national context.	 The Great Recession Sontombor 11, 2001
	minuenceu by the larger national context.	• September 11, 2001

	 SS.9-12.US.21 Analyze the causes of changing migration and immigration patterns to Nevada from Reconstruction to today SS.9-12.US.22 Trace the evolution of Nevada's economy across US history as it relates to national and global issues. SS.9-12.US.23 Evaluate the use of conflict and diplomacy in international relations from a US perspective. SS.9-12.US.24 Analyze the causes, impacts, and attitudes towards conflict and war from various points of view throughout US history. SS.9-12.US.25 Analyze the reciprocal nature of international relations as the US and other governments interact and influence one another. SS.9-12.US.26 Examine and explore the ways in 	 Destruction Persian Gulf War Afghan War Iraq War ISIS OKC Bombing Patriot Act Enhanced Interrogation Techniques Fake News Gerrymandering State's Rights Racism/Social Unrest Social Media Organization of Petroleum Exporting Countries (OPEC) Arab-Israeli Conflict
Multi-Cultural	 which diverse groups have been denied equality and opportunity, both institutionally and informally, at various times throughout US History SS.9-12.US.27 Analyze how resistance movements have organized and responded to oppression and infringement of civil liberties, and evaluate the impact of the responses. SS.9-12.US.28 Examine how American culture is influenced and shaped by diverse groups and individuals SS.9-12.US.30 Discuss the contributions of racially and ethnically diverse leaders to the advancement of our community and nation SS.9-12.US.31 Analyze the intellectual, cultural, religious, and artistic contributions of diverse individuals in America to our modern world 	

	SS.9-12.US.32 Examine the changing roles, impact, and power of political leaders, parties, and voting blocs over time.
	SS.9-12.US.33 Compare the evolution of different political, civil, religious, and economic institutions and their influence on individuals, communities, and government policies throughout US History
Civics	SS.9-12.US.34 Analyze the effects of media in shaping public perception and policies throughout US History.
	SS.9-12.US.36 Explain the historical background of a current national issue and propose a course of action to solve it.
	SS.9-12.US.37 Analyze major political policies and landmark Supreme Court cases and their impact on US History
	SS.9-12.US.40 Analyze how and why the US landscape has changed as people adapted the environment to meet their needs
Geography	SS.9-12.US.42 Explain how global circumstances and interaction affect resources, land use, culture, and population distribution in the US.
	SS.9-12.US.43 Examine the effect of individuals, communities, businesses, and government on the economic policies and decisions of the US over time.
Economics	SS.9-12.US.44 Evaluate multiple factors that impact the US economy over time, including but not limited to: trade, resources, labor and monetary system.
	SS.9-12.US.45. Evaluate the US's role and responses to globalization and the impact on the US economy, including trade policy, embargoes, exchange rates, and trade agreements.

SAMPLE UNIT PLAN:

Rooted School US History Sample Unit Plan

World War II

Students explore U.S. involvement in WWII, and how the outcomes of WWII propelled the U.S. into a leading world power.

Content Theme Standards:

SS.9-12.US.15, SS.9-12.US.23, SS.9-12.US.24, SS.9-12.US.25, SS.9-12.US.26, SS.9-12.US.27, SS.9-12.US.34, SS.9-12.US.36, SS.9-12.US.37, SS.9-12.US.39, SS.9-12.US.42, SS.9-12.US.44, SS.9-12.US.45

Disciplinary Skill Standards addressed within daily lesson throughout the unit: SS.9-12.US.1, SS.9-12.US.2, SS.9-12.US.3, SS.9-12.US.4, SS.9-12.US.5, SS.9-12.US.6, SS.9-12.US.7, SS.9-12.US.8, SS.9-12.US.9, SS.9-12.US.10

Unit Question:	Unit Goal:
What is the role of war in nation building?	By the end of the unit, students will be able to articulate, using knowledgeable claims with evidence, a variety of factors that caused the Allied victory during WWII.

Key Concepts:

Fascism, Appeasement, Munich Conference, Axis Powers, Non-Aggression Pact, Isolationism, Neutrality Acts, Lend-Lease Act, Pearl Harbor, Deficit spending, Rosie the Riveter, Propaganda, Rationing, Double V Campaign, Code Talkers, Tuskegee Airmen, Japanese Internment, *Korematsu vs US*, Homefront, Pacific Theater, European Theater, North Africa Campaign, D-Day, Island Hopping, Kamikaze pilots, Manhattan Project, Atlantic Charter, War conferences (Potsdam, Yalta, Tehran), Holocaust, Nuremburg Trials, United Nations

Topic 1: The Crisis in Europe and American Entry (7 days)

Topic Description:	Key Questions:
Students learn about the factors that influenced the start of WWII, and explore primary and secondary sources to investigate the reasons for U.S. entry into the war. Students analyze key speeches made by FDR to determine how support for U.S. entry into the war - and an abandonment of isolationism- was built. Students will use this knowledge to make a claim on the unit question regarding how U.S. involvement in WWII enhanced its nation building efforts.	 How did FDR's "Quarantine Speech" reflect the U.S. policy of isolationism after WWI? How did U.S. response to Japan's actions change over time? How did Japan perceive the actions of the United States? How did FDR change his words to encourage public support for U.S. involvement in WWII? Was U.S. involvement in WWII inevitable?

Source Materials:

Allied Powers Map, Axis Powers Map, FDR's "Quarantine Speech", Decision Following the Imperial Conference of September 6, 1941 (Tentative Translation – Japanese), "A Date Which Will Live in Infamy" speech and audio, FDR's "Four Freedoms" Speech

Topic 2: The US During the War (5 days)		
Topic Description: Students examine the homefront during WWII, including the role of minority groups and efforts made by government to finance, and build support for the war. Students will use this knowledge to determine how efforts on the homefront support nation building during times of war.	 Key Questions: How successful were government efforts to build support for WWII? How did WWII change the status of women and minorities in America? Why were Japanese Americans interned during WWII? How did the U.S. government use propaganda during WWII? 	

Various wartime propaganda posters, *Korematsu vs US*, Government Newsreel on Internment, "Americans in Concentration Camps" by Harry Paxton Howard, video interview with Japanese-Americans who lived in internment camps, "The Munson Report", various Dr. Seuss political cartoons **Topic 3: Victory and Outcomes of WWII (7 days)**

Topic Description:	Key Questions:

• How did U.S. involvement in WWII change
America's role in world affairs?
• How did the Allies manage to turn the tide against
the Germans in Europe?
• How did the Allies manage to turn the tide against
the Japanese in the Pacific?
• How should we remember the dropping of the
atomic bomb?

Source Materials:

The War in Europe Timeline, Island Hopping Map, Map of Europe After WWII, WWII "Deaths by Country" chart, Transcript of President Truman announcing the bombing of Hiroshima, Excerpt from "Every War Must End" by Fred Ikle

SAMPLE DAILY LESSON PLAN:

Rooted School US History Sample Daily Lesson Plan

World War II

Topic 2: The US During the War

Overview:

In 1942, over 100,000 individuals of Japanese origin or descent were forced from their homes and incarcerated. Their detention was federally mandated. However, a federal investigation in the early 1980s concluded that Japanese Americans posed no military threat. In this lesson, students investigate a series of primary documents to address the question: why were Japanese Americans interned during WWII? Lesson materials used from Stanford History Education Group: Japanese American Incarceration.

Objective:

Students will be able to compare arguments for and against Japanese American exclusion and internment by completing a graphic organizer.

Standards Addressed:	Key Question:	
SS.9-12.US.1, SS.9-12.US.3, SS.9-12.US.4, SS.9-12.US.5,	Why were Japanese Americans interned	
SS.9-12.US.6, SS.9-12.US.7, SS.9-12.US.8 SS.9-12.US.9,	during WWII?	
5S.9-12.US.10, SS.9-12.US.13, SS.9-12.US.14, SS.9-	5	
12.US.15, SS.9-12.US.24, SS.9-12.US.26, SS.9-12.US.37,		
SS.9-12.US.42		
Agenda:		
1. Do Now + Review Objective/Key Question		
2. Review previous lesson key concepts (Immigr Executive Order 9066).	ation Act of 1924, Bombing of Pearl Harbor	
3. Distribute graphic organizers and preview tas		
4. Students watch Government Newsreel (http://		
 Before video, explain context - this was made by the US government in mid 1942 to explain its reasons and strategies behind Japanese American incarceration 		
	for incarceration in graphic organizer with	
5. Students develop first hypothesis on why Japanese Americans were interned during		
WWII.		
6. Class discussion of first hypothesis		
• What were some of the reasons from the	video?	
How does the video portray internment?		
 Who do you think the audience was for the Distribute "The Museum Depart" and "America" 		
 Distribute "The Munson Report" and "America Students complete graphic organizer for both 	•	
9. Students develop second hypothesis on why 3		
WWII		
10. Class discussion of second hypothesis		
 Has anyone's hypothesis changed? Why o 	•	
• Do you find these documents more or less credible than the government newsreel?		
Why or why not?		
	nt?	
 Why is the date of Munson report importa 11. Wrap-up + Reflection 		

RS-CC recognizes that it cannot achieve its ambitious mission without high-quality teachers. To that end, RS-N will recruit highly capable teachers, help them grow professionally and provide a clear leadership pipeline to retain them within the organization.

Using our approach to DDO practices, we aim to achieve at least an 80% rate of teacher retention, growing to 90% in the long-term. Informed by *The New Teacher Project (TNTP)* report on teacher retention, *The Irreplaceables*,

RS-CC will implement the following to support the retention of high performing teachers.

The position of Director of Student Services, hired in year 1, supervises IEP and ELL programming, staff, and building-wide academic supports and interventions through grade level SST and coordination of the school-wide *Multi-Tiered System of Supports* (MTSS) team.

For students with more severe disabilities and/or needing higher levels of support, a continuum of services, from pullout services with interventionists and support staff, to more restrictive and/or self-contained settings, will be offered to meet the needs of each student per his/her IEP.

Contractors may be hired to provide additional student supports as well as possible shared services agreement(s), including but not limited to:

- Nursing
- Occupational Therapy
- Physical Therapy
- Speech Therapy
- Mental Health & Behavioral Support

These services will be provided based on students' IEPs and language learning needs. The director of student services and school leader will coordinate external wrap-around services for students as needed.

Core content teachers and coaches are supervised and coached by the school leader and assistant school leader. Teachers receive regular feedback from administration to support units instruction and projects aw well as daily lesson planning. Core content teachers and coaches collaborate with special education and ELL teachers during weekly data dives and half-day professional days. This time will be used to ensure that SDL delivered by core content teachers is created, monitored and evaluated by special education staff.

To date, we have identified a prospective school leader, Mr. Rick Jager. He will be working in the capacity of a Rooted consultant until such time as the RS-CC application is completed, submitted, and hopefully, approved. RS-CC will begin recruitment for leadership/management positions upon authorization. Our plan is to hire a director of school operations (budget permitting) and a school leader to manage the school start-up responsibilities during the incubation year.

(4) Please provide the succession plans for your proposed school's leader. This should include both emergency/temporary succession plans as well as detailed description for how potential school leaders will be cultivated and developed.

DRAFT_Succession Plan.RSCC

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rooted school

Purpose: The purpose of this document is to clearly communicate the timelines, responsibilities, communication practices, and context for Rooted School–Clark County's School Leader.

Timelines: We believe the following plan will sufficiently prepare Rooted School-Clark County for an emergency/temporary succession of its School Leader.

Responsibilities: For this succession plan, Rooted School-Clark County is utilizing a shared leadership approach. RS-CC will not have an "admin designee" while the School Leader is out/being determined. For each bucket of responsibilities, a member of the school leadership team (SLT) has been designated to own/support/manage that area of work.

For example, in an instance where the School Leader would meet with a parent about a concern regarding a consequence that was offered to a student, the Director of School Environment would meet with that parent (and likely loop in another leadership teammate to participate in the meeting). In an instance where the School Leader would typically sign Purchase Orders (POs) or a decision needs to be made about transportation, the Director of Operations would own all of those. The Director of Special Education would sit in on all IEP meetings as the admin, and any concerns from parents around IEPs

In moments when it is not clear which SLT member should handle a particular situation, the SLT member receiving the concern should send a text message to RSF (Frank, Kaitlin, or Jonathan) and one of them will reply with advice.

In moments when a teammate has a concern around navigating any aspect of our Deliberately Developmental Organization (DDO), especially as it pertains to interpersonal conflict, feedback repeatedly offered without resolution or change, or any persistent barrier that shows up in our work, the teammate can reach out to the following:

If it's an HR-related issue, the Director of Operations is available to receive the formal concern. If it's an issue that the teammate would like to thought-partner, problem-solve, or discuss in a less formal setting, the other member(s) of the SLT are available. In the event the teammate isn't comfortable meeting with any of the prior named teammates, they should reach out to RSF over email, and someone on the RSF team will follow up from there. If this issue is urgent, please text Frank at 702-407-1212, Kaitlin at 808-429-0240, and/or Jonathan at 504-208-6571.

In instances where a barrier or threat to Rooted is encountered outside of the scope of each SLT's work, OR when encountering a barrier or threat wherein the SLT member needs support within their domain of work, the SLT member will reach out to RSF via group text message and share information in the following way: DRAFT_Succession Plan.RSCC

- 1) Shares headline of the challenge/concern/barrier/threat they are facing
- 2) Shares any relevant context of the situation
- 2 or more solutions or next steps that the SLT teammate sees as options or possibilities in resolving the situation
- 4) Explicitly names any questions that are coming up for the SLT member not already captured
- 5) Closes with action needed from the RSF team

Domain of Work	SLT member who owns the domain	Notes/context
Operations (Transportation, food/SLA, facilities, budget, procurement, POs, etc)	Director of Operations	
Culture	Director of School Environment	
Curriculum, Instruction, Data	(Academic Lead identified by SLT)	
College and Career Counseling/Green Balloon Fellowship/Transcripts/Credit Accumulation	(Director of College and Career Counseling)	
Student support: IEPs, 504 plans, intervention requests, transportation regarding students with IEPs/504s, etc	(Director of Special Education)	
Technology	(Technology Lead identified by SLT)	
COVID-related concerns/questions/actions	Director of Operations	
PTO requests	Director of Operations and Academic Lead	
Newsletter	Front Office Manager	

Communication norms: RSF's top priority is the safety and success of our schools. SLT members may use RSF teammates' personal numbers for texts and calls. RSF teammates check their emails frequently throughout the day and will respond within 24 hours. This is a standard practice we keep with all the schools we support. School Leaders are cultivated through a variety of recruitment strategies, including, but not limited to:

- Networking through education channels including: CSGF, NSVF,
- Education recruitment sites including: *AppliTrack, SchoolSpring, Teaching Jobs, Teach for America, Education America, LinkedIn, ZipRecruiter,* etc.
- Research and design of competitive salary and benefits packages
- Advertising vacancies on our webpage
- Cultivating referrals from current board members
- Cultivating referrals from current Nevada school administrators
- Cultivating referrals from current school leaders in other regions

School Leader Development:

Please see ATTACHMENT 12 for school leader evaluation tools and training modules that align to this component.

The founding school leader will share a position scorecard that outlines his/her SMART goals and deliverables for the start-up year. These are directly linked to the *Green Balloon Fellowship* (GBF) and the *Foundations of School Leadership* training modules (below) and in Attachment 12.

The *Green Balloon Fellowship* (GBF) is the school leader training module associated with Rooted School's branding. It is intended to develop a school leader's ability to run and operate a Rooted School and is designed to work in concert with Rooted School's *Foundations in School Leadership (FSL)* training module that is aligned to the 6 Professional Standards for Educational *Leaders* (formerly known as the Interstate School Leaders Licensure Consortium or ISLLC) developed by the National Policy Board for Educational Leaders.

Weekly school leader coaching is an essential part of both the GBF and the FSL training modules. The GBF fellow is expected to meet weekly with his/her coach and on a monthly basis with members of the Rooted School Foundation senior leadership (i.e. CEO/Founder and/or Senior Advisor). These meetings help to move the leader along in his/her development as a Rooted School teammate and as a school leader/principal.

Our Green Balloon Fellowship training modules are outlined below:

Module 1 (Mission, Vision, The Rooted Way):

(a) Grounding the leader in Rooted School's theory of impact through schools and more

(b) Clarifies for the fellow how to execute a school model that will align with the broader theory of impact

Module 2 (Team Development):

The fellow will be responsible for:

- (a) Reading all texts for summer team development
- (b) Participating in Base Camp and The Climb
- (c) Completing all reflection activities
- (d) Debriefing each day of Base Camp and The Climb with School Leader and/or

Founder

Module 3 (Operational Excellence/DDO):

The fellow will be responsible for:

- (a) Systems to start-up school
- (b) All operational systems and structures
- (c) Operations manager shadowing
- (d) School Leader shadowing
- (e) Director of Student Environment shadowing
- (f) Introduction to coaching processes at Rooted.

Module 4 (Instruction/Student Culture):

The fellow will be responsible for:

- (a) School Leader shadowing
- (b) IPI walk-throughs
- (c) School environment shadowing
- (d) Observing/executing intervention groups
- (e) Facilitating SDL spaces
- (f) Leading Advisory for a week.

Module 5 (Data and Evaluation):

The fellow will be responsible for:

- (a) Observing team evaluation process
- (b) Engaging in a 360 Review
- (c) Participating in team-wide data dives and school year progress towards goals
- (d) Producing deliverables on the school startup plan.

Module 6 (Quality Practice):

The fellow will be responsible for:

- (a) Leading Rooted School—New Orleans with the School Leader shadowing you
- (b) Practicing systems and structures
- (c) Daily debrief with School Leader
- (d) Peer review from Rooted team.

Our *Foundations of School Leadership* training modules are outlined below:

The diagram below highlights the *Professional Standards for Educational Leaders* (formerly known as the *Interstate School Leaders Licensure Consortium* or *ISLLC*) developed by the National Policy Board for Educational Leaders. These standards work with the GBF to create a comprehensive course of study and practicum.

This includes the real-time experience of shadowing an already successful Rooted School Leader as well as actual case studies from the different Rooted School regions.

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This pragmatic approach to leadership development ensures that a GBF fellow is prepared to walk into school on day one and be successful.

(5) Complete the following table indicating projected staffing needs for the proposed school over the next six years. Applicants which propose to grow their schools to multiple campuses based on the school's academic

performance should also complete the second table outlining projected staffing needs for the entire network over the next six years. Include full-time staff and contract support that serve the network 50% or more. Change or add functions and titles as needed to reflect organizational plans.

STAFFING PLAN

The second		37	Cal	
PTO	posed	New	SCR	001

	SY 0	SY1	SY2	SY3	SY4	SY5	SY6
Year	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29
EMO/CMO Organization Positions (FTEs reflect full FTE for Allocation of time would depend on need from year to year.		ool Founda	ation, but s	taff will su	pport mor	e than 1 ca	mpus.
Chief Executive Officer	1.00	1.00	1.00	1.00	1.00	1.00	1.00
Senior Advisor	1.00	1.00	1.00	1.00	1.00	1.00	1.00
Program Advisor - Student Green Balloon Fellowship	1.00	1.00	1.00	1.00	1.00	1.00	1.00
Total Back-Office FTEs	3.00	3.00	3.00	3.00	3.00	3.00	3.00
School Staff							
Principals	0.50	1.00	1.00	1.00	1.00	1.00	1.00
Assistant Principals							
Add'l School Leadership Position 1 Director of Operations	0.50	1.00	1.00	1.00	1.00	1.00	1.00
Add'l School Leadership Position 2 Director of CTE		0.50	1.00	1.00	1.00	1.00	1.00
Add'I School Leadership Position 3 Director of Curriculum & Instruction	-	-	1.00	1.00	1.00	1.00	1.00
Classroom Teachers (Core Subjects)	-	5.00	10.00	12.00	12.00	12.00	12.00
Classroom Teachers (Specials)	•	1.50	4.00	4.00	4.00	4.00	4.00
Special Education Teachers	•	1.50	2.00	4.00	4.00	4.00	4.00
ELL/TESOL Teachers	-	1.00	2.00	3.00	3.00	3.00	3.00
Student Support Position 1 {Guidance Counselor}	-	-	1.00	1.00	1.00	1.00	1.00
Student Support Position 2 (Special Education Director)	•	0.50	1.00	1.00	1.00	1.00	1.00
Specialized School Staff 1 {Dean of Culture}	-	-	1.00	1.00	1.00	1.00	1.00
Specialized School Staff 2 [specify]							
Teacher Aides and Assistants							
School Operations Support Staff	•		1.00	1.00	1.00	1.00	1.00
Other {Bus Drivers}	-	1.50	2.50	3.00	3.00	3.00	3.00
Other {Nurse}	-	0.25	0.25	0.25	0.25	0.25	0.25
Other (please specify)							
Total FTEs at School	1.00	13.75	28.75	34.25	34.25	34.25	34.25

*YEAR 1:

- 1 School Leader
- 1 Director of School Operations
- .5 Director of Special Education

- .5 Guidance Counselor
- .5 Director of CTE

*It should also be noted that the Director of School Operations *is* a full-time position. It is listed as .5 position in year as a result of the likely start date (January of incubation year) not as a result of any calculation as a part-time FTE. It is also expected that this position will oversee many of the additional responsibilities outlined in the SPCSA feedback including, but not limited to:

- Benefits Administration
- Employment Eligibility
- Background Checks

*YEAR 4 (Scale):

- 1 School Leader
- 1 Director of School Operations
- 1 Director of Special Education

- 1 Guidance Counselor
- .5 Director of CTE
- 1 Front Office Manager
- 1 Dean of Culture

Rooted's Instructional Team will be comprised of the following positions:

*YEAR 1:

- 1 core instructional teacher ELA
- 1 core instructional teacher mathematics
- 1 core instructional teacher science
- 1 core instructional teacher socialstudies
- .5 technology teacher/technology coach

*YEAR 4 (Scale):

- 3 core instructional teacher ELA
- 3 core instructional teachermathematics
- 2 core instructional teacher science
- 2 core instructional teacher socialstudies1 physical education/health teacher
- 2.5 technology teachers/technologycoach (.5 Director of CTE)
- 2.5 instructional teachers of StudentServices (SPED)
- 2.5 English Language Learner (ELL) & Academic Interventionists

HUMAN RESOURCES

(1) Describe your strategy, plans, and timeline for recruiting and hiring teachers. Explain key selection criteria and any special considerations relevant to your school design.

Key Selection Criteria for Rooted Teammates

When hiring for a high caliber teammate, we look for teammates who can meet the academic standards of highly qualified teachers across the country and exacting personal and professional standards aligned to the goals of deliberately developmental organization (DDO). We will also search for educators who are local to the Clark County, Nevada area because of our belief in the importance of knowing the community.

This means going beyond consigning people development to high-potential programs, executive

(.5 Director of CTE)

- 1 instructional teacher of StudentServices (SPED)
- 1 English Language Learner (ELL) & Academic Interventionist

coaching or once-a-year off-site professional development. It means fashioning an organizational culture in which people development is woven into the daily fabric of working life and the company's regular operations, daily routines and conversations. A commitment to this type of teamwork is the first priority we look for in prospective teammates. We believe this commitment is critical because it is what we ask of our students—to be directors of their own learning and growth in an environment designed to support and develop them.

If we believe the person has the potential to thrive within a DDO, we adhere to a set of selection criteria (see below) and indicators to assess his/her ability to serve our anticipated student population and be effective in teaching students identified as "at-risk".

Fit & Match:

- We want teammates who demonstrate a passion for and a commitment to Rooted's mission.
- We want teammates who have an unwavering commitment to radical transparency and radical open-mindedness (i.e. Regardless of how much you know about something, you could still be wrong).
- We want teammates who thrive in a startup environment (i.e. comfort with frequent, focused change and ambiguity coupled with strong initiative).
- We want teammates with a track record of outstanding academic results who have at least three years of core content teaching experience in upper middle school and/or high school in a low-income/high needs community.
- We want teammates who exhibit an exceptional ability to execute at a high level in the classroom while concurrently building secure attachments with students.
- We want teammates who are deeply invested in restorative practices and who are masters of classroom management.
- We want teammates who have knowledge of project-based learning.
- We want teammates who have experience in school(s) that rely heavily on projectbased learning as a means to develop content knowledge and skills.
- We want teammates who have experience in school(s) that rely heavily on digital curriculum as a means to develop basic content knowledge and skills.
- We want teammates who are committed to researching and remaining abreast of best instructional practices as they may advance our mission.

Timeline for Hiring: All teachers, administrators and support staff will be hired at least 30 – 60 days prior to the start of school each year to allow for our two onboarding programs:

- 1) Basecamp (approximately 1 week)
- 2) The Climb (approximately 2 3 weeks depending on staff experience and retention
- (2) Describe your plan to recruit and hire teachers/staff who are representative of your student body.

Diversity, Equity & Inclusion: All Rooted Schools are committed to hiring faculty and staff from the communities in our region schools and who represent the ethnic and demographic make up of our students and the community at large.

In the Clark County, Nevada region, we would anticipate hiring a demographic that is representative of the following breakdown with a clear understanding that the zip codes that we intend on serving currently have a preponderance of Hispanic/Latin-X and African American students.

DEMOGRAPHIC	American Indian / Alaskan Native %	Asian %	Hispanic %	Black %	White %	Pacific Islander %	Two or More Races %
State	0.82	5.44	42.69	11.45	31.36	1.46	6.78
State Charters	0.46	7.69	32.69	10.51	38	1.65	9.01

(3) List the proposed school's salary ranges and employment benefits for each employee, as well as any incentives or reward structures that may be part of the compensation system. Explain the school's strategy for retaining high-performing teachers.

Salary and Benefits

RS-CC's teachers will be compensated according to a salary scale that is based on years of classroom teaching experience in tandem with advanced degrees and/or national board certification.

The school leader will carefully review new teacher resumes to make an accurate salary offer. The school leader will also ensure that offers and subsequent increases are highly competitive with paylevels for similar positions throughout the region. Teacher salaries are set annually with the RS-CCBoard of Directors and are based on an analysis of the above criteria along with projected salaries for Nevada's Public Schools.

Average salaries projections are included in the table below.

RS-CC Base Salary Ranges:

Position	Base Salary
School Leader	\$100,000
Assistant School Leader	\$72,828
Director of School Operations	\$65,000
Director of CTE	\$70,000
Director of Student Services	\$60,000
Front Office Manager	\$43,000
Teachers and Tech Coach	\$55,000
ELL/ Academic Interventionist	\$55,000

Insurance and Employment Benefits

All RS-CC employees who work at least half-time (20 hours per week) will receive health and other benefits, such as life insurance and retirement, through the School Employees Benefit Board. As public-school employees, RS-N teachers will also participate in the *Public Employees' Retirement System of Nevada* (NVPERS).

Rooted School's personal/sick leave policy is guided by our five pillars. Employees are expected tomake choices in the best interest of the organization, which includes recognizing the need for their own self-care. With that, personal/sick leave should be taken on an 'as-needed basis', using one's own best judgment. All personal/sick leave is tracked and paid, unless notified otherwise by the school leader or his/her designee.

(4) What is the proposed teacher-student ratio, as well as the ratio of total adults to students?

The proposed teacher-to-student ratio is 1:20 for all core content courses. Those ratios could increase slightly 1:25 for courses like Health/Physical Education.

The proposed faculty/adult to student ratio in year 1 will be 1:8 based on a budget that allows for 11 FTEs.

(5) State the procedures - including the individual responsible for each step - for hiring and dismissing school personnel, including conducting criminal background checks.

The following operational / systems procedures will also be shared between the School Leader and the Director of School Operations with additional counsel and support from RSF as needed or requested.

Hiring Procedures:

- Post Position using one of the many professional job posting portals previously outlined
- Gather resumes
- Conduct independent resume reviews using the Rooted School Resume & Cover Letter Rubric to ensure equity and a bias-free process in line with EEOC
- Contact prospective candidates whose credentials meet the required criteria outlined in the job posting on the Rooted School Clark County website
- Conduct preliminary phone interviews to screen the best candidates for a follow-up in-person interview
- Use the *Rooted School Clark County Phone Interview Screening Rubric* to ensure equity and a bias-free process in line with EEOC
- Conduct a panel, in-person interview with all viable candidates using a scripted set of questions that all candidates will receive
- Provide the candidates a series of tasks to complete scored according to *the Rooted School Clark County Task Scoring Rubric* to ensure equity and a bias-free process in line with EEOC
- Offer the finalist a contract offer in keeping with the previously outlined salary scale

The key to RS-CC's success will be its ability to attract and retain a staff that is committed to its mission, values and vision with the motivation necessary to anchor our Four-Year Promise. To that end, it will be essential that Rooted design hiring, compensation, benefits, promotion and evaluation systems aligned with its mission and goals.

Teachers will be assessed based on their performance through the Danielson Framework which includes

student performance results, including for students identified as "at-risk". As a results-driven school, all employees of Rooted will be "at-will." Teachers who attain the required levels of performance will be offered a subsequent annual contract.

Rooted will use five strategies to retain its teachers, adapted from *The Irreplaceables*, an extensive study of teacher retention best practices published by TNTP: ⁵⁴

- **Rewarding work environment:** Teachers will benefit from a highly professional environment, rigorous standards for performance, small school size, extensive in-class support, high-quality professional development and a team-oriented approach to teaching.
- **Competitive salaries and benefits:** We are confident that teachers will choose to work at RS-N based on its mission, work environment and opportunities for professional growth. Rooted will offer salaries competitive with other charter schools in Clark County, Nevada.
- Non-monetary recognition: RS-CC will recognize and appreciate its teachers in a number of ways: video of their classrooms to lead professional development sessions for other teachers, staff serving as Rooted representatives at regional and national conferences, staff "glows" or "shout outs" at weekly all-staff meetings, teacher celebrations during "Teacher Appreciation Week" and special gifts, awards and recognition at annual holiday celebrations and end-of-year dinners.
- **Recruitment and hiring:** Research affirms that effective teaching "completely changes the academic trajectory of low-achieving students—vaulting them from the lowest to the highest quartile." Therefore, Rooted will utilize successful practices to recruit, hire, develop and retain educators of the highest caliber. Its recruiting efforts will extend across the country, and Rooted will deliberately connect with mission-aligned organizations.

Dismissal Procedures:

As employment with RS-CC is "at-will", the RS-CC leadership mutually retain the right to terminate the staff member's employment at any time with or without reason and with or without notice. Employment is for no specific period of time, and unless set forth in writing and signed by the School Leader.

Prior to terminating a staff member, the school leader will follow the steps below, unless there are circumstances such as unlawful behavior that warrant immediate termination. When an employee struggles to improve his/her performance to the level we expect of all teammates within a deliberately developmental organization (DDO), the staff member is placed on a professional growth plan (PGP). This usually starts when there is at least one critical counter-value behavior that has shown up at least two times per session throughout the school year. A counter-value behavior is one that does not align to RS-CC's five pillars.

Most PGPs require that the teammate in question commits to reducing the counter-value incidents to one (or fewer) per session. If they are unable to reduce the occurrence of the behavior or if the PGP is not adhered to, the employee could experience a consequence that includes but is not restricted to:

⁵⁴Wu, M., Morgan, K., Hur, J., Schifrin, K., Gordon, L., Russell, G., Huynh, H. & Shannon, S. (2012). The Irreplaceables: Understanding the Real Retention Crisis in America's Urban Schools. The New Teacher Project. Retrieved from https://tntp.org/assets/documents/TNTP_Irreplaceables_2012.pdf

- Reduced paid work responsibilities
- Additional readings and professional development
- Termination of employment per the at-will contract

Generally, the school leader will provide a staff member 30 days to reverse the pattern of behavior. At the 30-day mark, the school leader and staff member will re-evaluate the progress made and determine the best next steps for them and the RS-CC community.

Criminal Background Checks:

This will be the sole responsibility of the Director of School Operations for each hire at the start of each school year as well as during for any replacement staffing that may be required.

(6) Explain how teachers will be supported and developed. Describe the school's performance management system and process for teacher evaluation. Provide your teacher evaluation tool(s) as Attachment 11, as well as any supporting protocols or documentation.

If we hire newly certified teachers, teachers with conditional or emergency certifications or those with less than three years of teaching experience RS-CC will provide the following supports:

- Participate in Base Camp and The Climb (approximately 20 days of onboarding to the model and team development)
- Participate in Rooted's professional development experiences (approximately 15 days of team training throughout the year)
- Bi-weekly scorecard check-ins are a formal mechanism we use to provide affirmative, constructive and evaluative feedback to RS-CC teachers. This is also an opportunity for teachers and their coaches to problem solve and align on new strategies that will accelerate teaching and learning
- More frequent coaching will be provided to teachers that are not meeting their growth goals.
- Daily observation by at least one administrator/instructional coach
- Talking partner(s) (as per our DDO structure) that advances the teacher's ability to navigate conflict in the workplace

Each teacher's needs are unique. If it is determined that the new teacher needs other supports than what RS-CC is able to offer, we will problem-solve with the teacher to ensure her/his professional growth needs are met.

Please see ATTACHMENT 11 for additional details.

(7) Please explain the responsibilities of each of your school's administrative/leadership team members with regard to recruitment, hiring, development and retention of a highly effective staff. Identify the staff member responsible for leading payroll, benefits, and employee relations and describe how key Human Resources responsibilities will be managed.

All aspects of HR will be shared between the School Leader and the Director of School Operations; this includes the responsibility for:

- Payroll
- Benefits
- Employee relations
- Etc.

As always, the school leader will be the person with whom this responsibility ultimately rests. However, he/she will be working in direct concert with the Director of School Operations whose job responsibilities and duties are outlined in detail below:

Human Resources:

- Manage the staffing process, including recruiting, interviewing, hiring and onboarding
- Ensure job descriptions are up to date and compliant with all local, state and federal regulations
- Develop training materials and performance management programs to help ensure employees understand their job responsibilities
- Create a compensation strategy for all employees based on market research and pay surveys; keeps the strategy up to date
- Investigate employee issues and conflicts and brings them to resolution
- Manage HR related activities, including staffing compensation, managing records, pay roll and employee relation.
- Reviews and recommends policy and procedure update in compliance with federal and state employment regulations.
- Administers various employee benefits programs including group medical/vision, dental, life and supplemental insurances
- Manage liability insurance claims
- Submit any work related injury documentation to Work Comp carrier, track injuries and OSHA 300 logs and postings
- Supports recruiting functions by screening and interviewing applicants
- Conducts new employee orientations and staff trainings as needed
- Identifying and clarifying employee issues and implementing solutions, including coaching and counseling
- Maintain confidentiality for HR related issues

Facilities and Safety

- Ensure that all classrooms and spaces are clean, safe, and reflect our core values
- Manage vendor relationships to ensure the highest quality services
- Ensure that all auxiliary staff and support staff are held accountable to the school's cultural expectations
- Ensure that school buses run on time each day and are safe
- Maintain facility daily to meet the needs of students and teachers
- Ensure that the campus is secure during the day and after hours

• Manage the campus security team

Office and Staff Support

- Ensure that equipment (copy machines, staff computers, student computers) are always available and maintained for use by teachers and staff
- Guarantee that all requested materials and educational resources are available in a timelymanner for teachers and staff
- Establish clear procedures for staff to request material needs; hold staff accountable to thoseprocedures
- Make student information available at all times to teachers and staff
- Maintain the main office as a calm, welcoming space
- Give operations team members regularly scheduled development and hold them accountableto the cultural expectations across the school

Financial Management and Sustainability

- Follow internal control policies as written by Rooted School
- Approve and submit invoices to Rooted School for payment
- Account for and submit cash to Rooted School for deposit
- Review and monitor school budget and payroll
- Develop, design and monitor a comprehensive, competitive benefits package

Student and Family Services

- Create a main office founded on organization and responsiveness to ensure student, parent, staff and visitor satisfaction
- Ensure that breakfast, lunch, and snack are distributed on time each day
- Ensure that the school is fully enrolled and has a waiting list equal to at least 10% of itsenrollment
- Maintain up-to-date student records, including demographic and academic information for each student

State & Local Level Compliance

- Keep accurate enrollment files on each student
- Keep accurate attendance daily and ensure that daily attendance is 95% on average
- Complete all state reporting in a timely and accurate manner
- Collect 100% of lunch forms from students and families

Team and Operational Leadership

- Lead the school operations team and vendors in ensuring every detail and every part of the day is well-managed
- Coach operations staff and vendors towards excellence
- Delegate operational responsibilities across the school team

(8) Explain how the school and organization intend to identify and address unsatisfactory leadership or teacher performance, as well as leadership/teacher changes and turnover.

All employees at RS-CC are at-will employees. At-will contracts clearly outline the role expectations of each employee. Employee rights will be articulated in the RS-CC Personnel Handbook, which will include all employment procedures.

Employee contracts will be renewed annually in June based on evidence that the employee is exceeding all requirements of the position. The school leader and director of school operations willadminister contracts for school-based staff. The RS-CC Board of Directors will administer school leader contracts.

All leaders, teachers and support staff alike are expected to uphold the Rooted ideals outlined below:

- Creating, refining and advancing a relevant/coherent curriculum aligned to Nevada's graduation standards
- Collaborating with other content area teachers to design cross-curricular projects that emphasize targeted core content and soft skills across curriculum
- Meticulously monitoring student data, providing frequent targeted feedback and support in response to that data
- Consistently implementing and executing student interventions with flexible grouping
- Executing Rooted's hybrid academic model with fidelity and consistency each day
- Actively establishing Rooted's culture among students, partners and the community-at-large

When there is a breech in core values, all employees will be expected to follow the procedures outlined below:

- 1. Explain the rationale/reason for the break/breech in protocol
- 2. Be given a chance to repair or make adjustments to behaviors and/or professional practice
- 3. Review appropriate practice with his/her immediate supervisor

If the issue continues:

- 4. The employee will be placed on a *Professional Improvement Plan* (PIP) that will be reviewed and updated weekly for a period of not less than four weeks
- 5. Should the PIP prove to be ineffective in ameliorating the concern(s), the employee will meet with a member of the RSF team for additional counseling and support for a period of not less than four weeks. These meetings will be documented in the PIP.
- 6. If after the additional four weeks, no change in behavior is noted, the school leader or board president (in the event that the school leader is the employee in question) will begin formal termination procedures. These have been previously outlined.

Process for Addressing Employee Concerns

RS-CC requires its directors, officers and employees to observe high standards of business and personal

ethics. As employees and representatives of RS-CC, we must practice honesty and integrityin fulfilling our responsibilities and comply with all applicable laws and regulations.

Each employee has a general duty to report all potentially illegal or unethical conduct by the organization or a fellow employee, as well as potential violations of the organization's code of ethics as described in the *RS-CC School Personnel Handbook*.

The process for an employee to raise a grievance is as follows:

- The employee brings their concern to their supervisor in writing including the date of the alleged incident, persons involved, a description of the incident, and any supporting documentation.
- If the employee is not satisfied with the response, they may ask that the concern be taken to the school leader of RS-CC.
- The school leader, upon receiving the concern in writing, will investigate and respond in writing.
- If the employee is not satisfied with the response from the school leader, the employee may ask that the concern be taken to the chair of the board of directors of RS-CC.
- The board chair, upon receiving the concern in writing, will investigate and respond in writing.

In the event that the concern involves a procedure, action, or directive of the school leader, an employee may file a complaint directly with the chair of the board of directors. In such instances, the board chair will be the investigator and final arbiter of the concern.

No disciplinary actions shall be taken against any employee who reports harassment or discrimination, unless following investigation, the employee is found to have made the report in bad faith.

Teacher Turnover / Leadership Turnover:

Over the years, in our current two regions, teacher/administrative turnover has not been a significant issue as we typically maintain a retention rate of 85% or higher.

With that said, the landscape of teaching and education in general is shifting. There is a national teacher shortage and the same is true of administrative personnel. The recent pandemic has decimated the teacher rank and file across a broad swath of our country. The U.S. Department of Education recently released the following *Call to Action*:

These shortages in critical areas have a direct impact on educational opportunity for students, and research shows that educator shortages disproportionately impact students of color, students from low-income backgrounds, students with disabilities, and students from rural communities.

In the State of the Union, President Biden encouraged leaders to use pandemic relief and recovery funds from the American Rescue Plan Act of 2021 (ARP)

and other federal funds to address teacher shortages—including the Governor's Emergency Education Relief (GEER), Elementary and Secondary School Emergency Relief (ESSER), and Higher Education Emergency Relief (HEERF) funds to help with these efforts.

To support the President's call, today Secretary Cardona is calling on state policymakers, higher education leaders, and school districts to use pandemic relief and recovery funds to increase the number of teacher candidates prepared to enter the profession as early as possible. He is also calling on teacher preparation programs and school districts to work together in innovative ways to address the teacher shortage.

We plan to follow suit with this recommendation and use additional funding to attract the best teachers and school leader candidate. Aside from providing a culture of radical transparency, open sharing and professional community, Rooted believes in improving salaries and benefits and offering monetary incentives for goals reached; this will continue to bring us highly qualified professionals who want to work in our schools and want to work to advance our mission.

(9) Will your organization require additional support (from third parties or consultants) for core Human Resources functions (e.g., payroll, benefits administration, employee relations, etc.)? If yes, please detail the areas that will require additional support and the costs and criteria for selecting such services. If not, please provide a detailed description of how these functions will be managed.

At this time, our goal is to have our Director of School Operations handle all core HR functions.

Please refer to question 7 of this section for a detailed description of the DOO duties and responsibilities.

STUDENT RECRUITMENT AND ENROLLMENT

Like all public schools, public charter schools must be open to any such child, regardless of that child's race, gender, citizenship, or need for accommodations or special education services. Thus, recruitment and enrollment practices should demonstrate a commitment to providing all students equal opportunity to attend the school, and help schools avoid even the appearance of creating barriers to entry for eligible students.

(1) Explain the plan for student recruitment and marketing that will provide equal access to interested students and families, including how the school will comply with the requirements of <u>R 131</u>. Specifically, describe the plan for outreach to: families in poverty; academically low-achieving students; students with disabilities; and other youth at risk of academic failure. For schools which are giving one or more statutorily permissible admissions preferences pursuant to NRS 386.580 or SB390 (2015 session), please indicate if you plan to focus your student recruitment efforts in specific communities or selected attendance areas.

(a) What is the enrollment calendar for both the first year of operation and subsequent years of operation? Please specify the dates on which the school will begin accepting applications and how long the enrollment window will last prior to conducting a lottery. Note that your proposed enrollment window should satisfy the requirements of NRS 388A.453(7).

In the planning year, enrollment will be an ongoing process from the time that a school leader and the Director of School Operations are identified and approved by the Rooted School Clark - County Board.

Enrollment will begin in earnest each year (subsequent to the planning year) in January and continue through July or until target numbers have been met. The goal will be to accommodate every student wishing to participate in Rooted School's academic program while making certain to maintain class sizes appropriate to the model (i.e. 1:20 Teacher-to-Student ratio).

(b) What enrollment targets will you set and who will be responsible for monitoring progress towards these targets? What is your target re-enrollment rate for each year? How did you come to this determination? What are the minimum, planned, and maximum projected enrollment at each grade level? Outline specific targets in the table below.

*Please see the tables in (3) for all projected enrollment targets. These projections are based on initial assessment of student interest as well as facility size/availability.

Meeting enrollment targets will be one of the key responsibilities of the School Leader and the Director of Operations.

(c) What systems will you put in place to ensure that staff members are knowledgeable about all legal enrollment requirements pertaining to special populations and the servicing of particular populations of students?

The School Leader and the Director of School Operations will develop and deliver a PD session to all faculty and staff to ensure full compliance with enrollment pursuant to R 131 and to NRS 386.580 or SB390.

(2) Describe the student recruitment plan once your school has opened. In what ways will it be different than your pre-opening year, in terms of the strategies, activities, events, persons responsible and milestones? How will the school backfill vacancies in existing grades?

RS-CC will use a multi-pronged recruitment strategy to ensure that families, particularly those that have been systemically undeserved, across Clark County, Nevada and outlying neighborhoods are aware of RS-CC as a potential high school option for their child.

We will focus on neighborhoods in Clark County, Nevada, in particular, as many of them are home to our anticipated student population. All recruitment materials will include a statement of the mission, a description of the proposed model and an explicit reference to RSCC's commitment to serve all students in a culturally inclusive environment.

A sample of the strategies we will use to attract a diverse student population in terms of race, ethnicity, national origin, gender, socioeconomic status, language preference, special education needs and sexual orientation is below:

Strategy	Inclusive Tactics
Facebook Advertising Campaign	 Targeted Facebook advertising that will share the story and mission of RS-CC and gather contacts to potential parents. Digital Facebook campaigns can be targeted to specific demographics within Clark County. Facebook can automatically translate posts and advertisements to various home languages and widely disseminate pictures and video assets that bring the RS-CC model to life.
Middle School Champions	 Leveraging relationships with local middle school leaders who serve our target community. We will pitch RS-CC to middle school leaders, students and parents. As a "call to action", we will ask families to apply for the high school and/or suggest other students and families in their network that might enroll because they are more aligned to RS-CC's mission and vision. This strategy has worked for us in meeting enrollment goals for New Orleans and Indianapolis and we expect the trend to hold true in Vancouver, Washington as well.
Newspaper Op-Ed and Features	• We will use public awareness of RS-CC as a new high school option by seeking featured articles and op-eds in leading local publications like <i>Las Vegas</i> or <i>The Boulder City News</i> and regional ethnic publications such as <i>El Tiempo</i> or <i>The Nevada Independent</i>
Community Events	 Local events including Latino community fairs and gatherings will advance understanding of RS-CC and its mission. We can also pivot to online participation of events, virtual tabling and sponsorships, as needed.
Community Design Sessions	 Public sessions with local technology employers and focus group conversations with Mr. Jager. RS-Nola alumni to share about the Rooted model, get feedback to contextualize the model for the region's educational needs, and meet other interested stakeholders. RS-CC will prioritize focus groups with middle school students and current high school students enrolled in online and technical schools in the region to understand what they are seeking in a school experience.
Community- Based Organizations (CBOs)	 We will work with the partners to share information about the school with their members and constituents at locations where families receive services. We will also contract with partners to provide translation services to families that need it.
School Tours	• Once RS-CC is operating in a school building, we will host student and family tours each month for any interested students to observe our model in action.
Public Exhibition Nights	 Once RS-CC is operating, we will invite interested families and students to be audience members at student portfolio exhibitions, along with our industry partner panel, so they can see the outcomes of the RS-CC schooling experience for students.
Community Engagement Training for Staff	 Community engagement is work that must be done by all members of the RS-CC team. Prior to school opening, the team will spend time understanding the history and context of the region and connecting with families via home visits. Over the life of the school, the team will continue to be trained on culturally

responsible methods of community engagement, provided through their
membership with the Washington State Charter Schools Association.

Outreach to At-Risk Students

The strategies listed above are intended to recruit at-risk students, including low-income students, students with disabilities, students of color and transitional bilingual students as part of a comprehensive outreach plan.

By removing common barriers, our strategies are intended to accommodate varying levels of access, literacy, transportation and family circumstances. RS-CC will ensure that these strategies are implemented with care to include low-income housing complexes, wrap-around family service centers and other organizations that serve at-risk students and their families.

We will work with local CBOs to understand where and how families in our target demographics prefer to get their information. Further, the school team will post fliers in multiple languages andleave applications at key community hubs such as grocery stores, ethnic grocers, gas stations, libraries, laundromats, food banks, place of worship and shelters to ensure that families that may not have access to digital media will have opportunities to learn about the school through alternative means.

RS-CC will comply with all Nevada requirements regarding legal, fair and equitable treatment of all families interested in applying. RS-CC will also pilot several virtual community engagement methods, including hosting webinars and, one-on-one stakeholder conversations via Zoom.

Maintaining Recurrent Enrollment

Maintaining student enrollment is a key priority for RS-CC. In our first three years, Rooted School—New Orleans retained more than 90% of its founding class. RS-CC will incorporate similar strategies into its plan for retaining students year-over-year.

Strategy	Details
End-of-Session Surveys (Parents and Students)	Targeted surveys for parents and students at the end of each RS-CC session (every 5–8 weeks) that allow the school leadership team to gather feedback and analyze trends to mine for potential threats or opportunities that might affect family satisfaction.
Quarterly Town Halls	Approximately every three months, RS-CC's school leader will share an update on school and student progress with the RS-CC community. Families will be invited to bring their questions, ideas, and concerns.
Removal of Common Barriers	RS-CC will provide 1-to-1 computing to access the various digital platforms that are staples to the Rooted model. We will also look to provide transportation, family wrap-around support services, meals, flexible scheduling and more to remove common barriers and allow families to engage openly.
Whole Village Art	RS-CC will provide each student access to at least one art therapy session a week, for the entire school year. Art therapy has been shown to have a statistically significant positive effect on students in a number of studies by the <i>National</i>

Those strategies include:

Therapy	<i>Center for Biotechnology Information.</i> ⁵⁶ Art therapy will not beprovided without parent consent.
Culturally Relevant Curriculum	 Between exposing students to the latest industry-based credentials and contextualizing our project-based curriculum to reflect the surrounding community, RS-CC will also provide students a chance to build community knowledge year-over-year. Students' portfolios provide a comprehensive dashboard to track and communicate academic progress on multiple measures of <i>Deeper Learning, MHA</i> and social justice standards. Teachers receive anti-bias and cultural humility training and are taught to analyze the curriculum to ensure it is representative of and relevant to our students' experiences.

Lottery

With its focus on self-directed learning, Industry Based Credentials, and project based learning, Rooted School–Clark County is expected to be fully enrolled by fall 2022. As such, we anticipate the need for a lottery process to ensure high quality seats are back-filled in a timely manner so that Clark County families are given the opportunities to enroll when the choice is available. See the polies for Rooted School–Clark County's lottery plan below.

- RS-CC will set an enrollment target at approximately 12% above the capacity target, aiming to account for attrition without over-enrolling.
- A seat becomes available when a current student's legal guardian withdraws this student to a different school by written notification to the main office.
- A seat becomes available when RS-CC receives a Transfer and Document Request from another school.
- A seat may become available when a current student no longer attends school and the school is not able to reach his or her family for withdrawal information.
- Once a grade level is full, prospective students will be added to a lottery list.
- RS-CC gives preferences to siblings of current students and children of team members. These prospective students will not be part of the lottery but will be given a seat automatically as soon as it becomes available.
- When a seat becomes available, RS-CC will conduct a random lottery to select the prospective student to fill the available seat. School personnel will contact the legal guardians of selected student. If their legal guardian does not confirm by registration within the communicated deadline, then RS-CC will conduct another lottery to select the student until the seat is filled.

To ensure equal access to a quality education, RS-CC has a mandatory back-filling policy to keep classrooms at 23 students per class.

(3) Complete the following tables for the proposed school to open in 2022-23. Experienced Operators applying for multiple schools must complete enrollment summary tables for each school campus opening in fall 2022.

		Number o	f Students			
	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29
Pre-K						
K						
1						
2						
3						
4						
5						
6						
7						
8						
9	90	90	90	90	90	90
10	82	86	87	89	88	89
11		87	87	89	88	89
12			85	86	86	89
Total	172	263	349	354	352	357

(a) Minimum Enrollment (Must Correspond to Break Even Budget Scenario Assumptions)

(b) Planned Enrollment (Must Correspond to Budget Worksheet Assumptions)

		Number o	of Students			
	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29
Pre-K						
K						
1						
2						
3						
4						
5						
6						
7						
8						
9	90	90	90	90	90	90
10	90	90	90	90	90	90
11		90	90	90	90	90
12		0	90	90	90	90
Total	180	270	360	360	360	360

(c) Maximum Enrollment (Note: Enrolling more than 10 percent of the planned enrollment described in subsection b will necessitate a charter amendment)

		Number o	f Students			
	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29
Pre-K						
K						
1						
2						
3						
4						
5						
6						
7						
8						
9	99	99	99	99	99	99
10	99	99	99	99	99	99
11	0	99	99	99	99	99
12	0	0	99	99	99	99
Total	198	297	396	396	396	396

(4) Describe the rationale for the number of students and grade levels served in year one and the basis for the growth plan illustrated above. Start-up applicants proposing to open with more than 400 students or more than 3 grade levels should identify and discuss the specific elements of the school model detailed throughout the application that demonstrate that the proposed school is designed to compensate for the known organizational and academic challenges which accompany serving larger student bodies and multiple grade levels in a start-up environment.

The rationale for beginning with a small projected enrollment (90 students per grade) is to ensure that our school is positioned for academic success and equitable access to all student populations.

This smaller growth model give RS-CC a unique opportunity to adjust enrollment strategies and to ensure maximum access for all students in the communities we intend serve (with particular attention to the Special Education and English Language student populations). This growth model has proven successful in our two current regions, New Orleans and Indianapolis.

COMMUNITY STUDENT INTEREST:

The tables below are intended to highlight current community and parent/student interest in the Rooted School model and academic program. This list will serve as an initial point of contact but will need to be updated as a result of the delayed application submission.

At last point of contact, many of the families continue to express an interest in the model and in the program and expressed disappointment in the decision to delay the application submission. A more updated list will be generated upon selection of the School Leader and Director of School Operations.

(5) As Attachment 13, please provide evidence of demand from prospective students and families within the community you intend to serve.

INCUBATION YEAR DEVELOPMENT

(1) Provide a detailed start-up plan as well as specific organizational goals for the planning year (SY 2021-2022) to ensure that the school is ready for a successful launch in fall 2022. Using the template provided, outline key activities, responsible parties, and milestones and submit as Attachment 14 ("Incubation Year Planning Table").

*See ATTACHMENT 14 for planning year goals and milestones.

(2) Please describe the plans for leadership training and development of the selected school leader during the incubation year prior to school opening and how these plans support your year 0 goals. If partnering with an organization, please briefly describe the main components of the training program and why that organization was chosen.

The founding school leader will share a position scorecard that outlines his/her SMART goals and deliverables for the start-up year. These are directly linked to the *Green Balloon Fellowship* (GBF) and the *Foundations of School Leadership* training modules (below) and in Attachment 12.

The *Green Balloon Fellowship* (GBF) is the school leader training module associated with Rooted School's branding. It is intended to develop a school leader's ability to run and operate a Rooted School and is designed to work in concert with Rooted School's *Foundations in School Leadership (FSL)* training module that is aligned to the *6 Professional Standards for Educational Leaders* (formerly known as the *Interstate*

School Leaders Licensure Consortium or *ISLLC*) developed by the National Policy Board for Educational Leaders.

Weekly school leader coaching is an essential part of both the GBF and the FSL training modules. The GBF fellow is expected to meet weekly with his/her coach and on a monthly basis with members of the Rooted School Foundation senior leadership (i.e. CEO/Founder and/or Senior Advisor). These meetings help to move the leader along in his/her development as a Rooted School teammate and as a school leader/principal.

Our Green Balloon Fellowship training modules are outlined below:

Module 1 (Mission, Vision, The Rooted Way):

- (a) Grounding the leader in Rooted School's theory of impact through schools and more
- (b) Clarifies for the fellow how to execute a school model that will align with the broader theory of impact

Module 2 (Team Development):

The fellow will be responsible for:

- (a) Reading all texts for summer team development
- (b) Participating in Base Camp and The Climb
- (c) Completing all reflection activities
- (d) Debriefing each day of Base Camp and The Climb with School Leader and/or Founder

Module 3 (Operational Excellence/DDO):

The fellow will be responsible for:

- (a) Systems to start-up school
- (b) All operational systems and structures
- (c) Operations manager shadowing
- (d) School Leader shadowing
- (e) Director of Student Environment shadowing
- (f) Introduction to coaching processes at Rooted.

Module 4 (Instruction/Student Culture):

The fellow will be responsible for:

- (a) School Leader shadowing
- (b) IPI walk-throughs
- (c) School environment shadowing
- (d) Observing/executing intervention groups
- (e) Facilitating SDL spaces
- (f) Leading Advisory for a week.

Module 5 (Data and Evaluation):

The fellow will be responsible for:

- (a) Observing team evaluation process
- (b) Engaging in a 360 Review
- (c) Participating in team-wide data dives and school year progress towards goals
- (d) Producing deliverables on the school startup plan.

Module 6 (Quality Practice):

The fellow will be responsible for:

- (a) Leading Rooted School—New Orleans with the School Leader shadowing you
- (b) Practicing systems and structures
- (c) Daily debrief with School Leader
- (d) Peer review from Rooted team.

Our *Foundations of School Leadership* training modules are outlined below:

The diagram below highlights the *Professional Standards for Educational Leaders* (formerly known as the *Interstate School Leaders Licensure Consortium* or *ISLLC*) developed by the National Policy Board for Educational Leaders. These standards work with the GBF to create a comprehensive course of study and practicum. This includes the real-time experience of shadowing an already successful Rooted School Leader as well as actual case studies from the different Rooted School regions.

Standard 1: The Vision of Learning 1a. Developing the Vision 1b. Communicating the Vision 1c. Implementing the Vision 1d. Monitoring and Evaluating the Vision
 Standard 2: The Culture of Teaching and Learning 2a. Valuing Students and Staff 2b. Developing and Sustaining the Culture 2c. Ensuring an Inclusive Culture 2d. Monitoring and Evaluating the Culture
 Standard 3: The management of Learning 3a. Making Management Decisions 3b. Developing Procedures to Ensure Successful Teaching and Learning 3c. Allocating Resources to Ensure Successful Teaching and Learning 3d. Creating a Safe, Healthy Environment to Ensure Successful Teaching and Learning
 Standard 4: Relationships with the Broader Community to Foster Learning 4a. Understanding Community Needs 4b. Involving Members of the Community 4c. Providing Opportunities for the Community and School to Serve Each Other 4d. Understanding and Valuing Diversity
 Standard 5: Integrity, Fairness, and Ethics in Learning 5a. Demonstrating a Personal and Professional Code of Ethics 5b. Understanding One's Impact on the School and Community 5c. Respecting the Rights and Dignity of All 5d. Inspiring Integrity and Ethical Behavior in Others
 Standard 6: The Political, Social, Economic, Legal, and Cultural Context of Learning 6a. Operating Schools on Behalf of Students and Families 6b. Communicating Changes in Environment to Stakeholders 6c. Working Within Policies, Laws, and Regulations 6d. Communicating with Decision-Makers Outside the School Community

This pragmatic approach to leadership development ensures that a GBF fellow is prepared to walk into school on day one and be successful.

(3) Explain who will work on a full-time or nearly full-time basis immediately following assignment of a location to lead development of the school(s) and the plan to compensate these individuals.

Planning Year Team:

If RS-CC'S charter is approved, we will have the following teammates in a full-time or part-time capacity:

RS-CC will have a core leadership team that will play a substantial role in the school's development, governance and management throughout its first charter term. These individuals are highlighted below:

Name	Area(s) of Expertise	Current/Intended Role
Director of School Operations (TBD)	 Financial and Operational Management 	All aspects of school operations including, not limited to: Transportation Food Service Facilities Budget & Finance Procurement
Director of CTE(Start Date of July 2022)	 IBCs Employer Relationships 	 All aspects of technology credentialing and technology partner development /recruitment Tech curriculum development & design
Jonathan Johnson	 K-12 Education Workforce Development Non-Profit and School Leadership 	 Founder and CEO of Rooted School Foundation Manager of pre-authorization activities prioto hiring School Leader Advisor to the Rooted School– Clark County Board of Directors and Rooted School–Clark County School Leader
Frank Ingargiola	 6-12 Education School and District Leadership Post-Secondary Education 	 Senior Advisor, Rooted School Foundation Advisor to the Rooted School—Clark County School Leader
Kaitlin Karpinski	K-12 EducationSchool Leadership	 School Leader, Rooted School—New Orleans Primary coach of the Rooted School—Clark County School Leader

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time capacity:

RS-CC will have a core leadership team that will play a substantial role in the school's development, governance and management throughout its first charter term. These individuals are highlighted below:

Name	Area(s) of Expertise	Current/Intended Role
School Leader (TBD)	 School Leadership and Management Instruction and Assessment School Culture Family and Community Engagement 	• All aspects of school leadership in theRooted Model with particular emphasis on academic achievement
Director of School Operations (TBD)	• Financial and Operational Management	All aspects of school operationsincluding, not limited to: • Transportation • Food Service • Facilities • Budget & Finance • Procurement
Director of Student Services SPED, ELL & CTE (TBD)	 IBCs Employer Relationships Perkins Grant Sp. Ed. Compliance Title VI ELL Compliance 	 All aspects of technology credentialing and technology partnerdevelopment /recruitment Tech curriculum development &design Understanding / administration of WIDA Writing of IEPs
Jonathan Johnson	 K-12 Education Workforce Development Non-Profit and School Leadership 	 Current Rooted School— WashingtonBoard Member Founder and CEO of Rooted SchoolFoundation Manager of start-up activities prior to hiring a School Leader
Frank Ingargiola	 6-12 Education School and District Leadership Post-Secondary Education 	 Senior Advisor, Rooted SchoolFoundation Primary coach of the Rooted School—Nevada School Leader

Network and School Leadership Team:

V - this		•	School Leader, Rooted School— NewOrleans
Kaitlin Karpinski	K-12 EducationSchool Leadership	•	Advisor to Rooted School— NevadaSchool Leader

RS-Clark County, like Rooted School—New Orleans and Rooted School—Indianapolis, aims to build a school and district partnership that commits to the following:

- Providing accelerated and personal pathways to financial freedom for students
- Creating backward-designed instructional scope and sequences with local technology employers (and other in-demand industries)
- Utilizing restorative disciplinary approaches and attachment-based teaching practices
- Fostering flexible learning environments that integrate digital technology tools to enhance teaching and learning
- Sharing best practices, professional development resources, and opportunities with other school partners

Ways in which Rooted School—New Orleans and Rooted School—Indianapolis have collaborated with districts in their respective regions include:

- Hosting site visits for district guests
- Facilitating professional development sessions on distance learning and CTEapproaches
- Sharing best practices on student attainment of industry-based credentials
- Creating a historic partnership with Eastern Star Church and in coordination with the local district, fulfilling the educational pillar of its four-pillar community revitalization plan, the ROCK Initiative in Indianapolis
- Providing an exemplar local model for career-connected learning

*Also see ATTACHMENT 7 for the school leader job description.

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SERVICES

(1) Provide a description of how the school leadership team will support operational execution. Please provide narrative or evidence that illustrates the staffing model, performance metrics, and the school's plan for supporting all operational needs of the school, including but not limited to those listed below. In this space and in the finances section, demonstrate how you will fund the provision of these services.

(a) Transportation: Describe your plans for providing student transportation. If the school will not provide transportation, please identify how the school will ensure that this does serve as a barrier to enrollment or ongoing attendance.

Transportation Plan

While we assume that many students will walk, while others will take public transit or be driven to school, RS-CC is sensitive to transportation needs. We will work with families to address their specific situations in order to avoid barriers to attendance. RS-CC students will receive transportation services throughout their four years of high school.

A contract with a private transportation company would include transportation to and from school, off campus field trips and school-sponsored events. RS-CC does not anticipate providing transportation for athletic events in the first few years of school operation, as it will not be running a school-sponsored athletic program. However, if students request the formation of an athletic/extracurricular offering, RS-CC will fundraise for additional busing capacity to support the program.

Additionally, when students are prepared to complete internships (PCL 3 and/or PCL 4), RS-CC will provide access to public transportation so there are no barriers to career opportunities. RS-CC also intends to provide special event busing (e.g. *School/Community Forums and Open Houses, Back-to-School Night, College Knowledge Night*, etc.) to our families from the Clark County area. For these purposes, RS-CC will contract with a private transportation company, such as First Student or Henderson.

Furthermore, the school will create community stops, so that students can travel to a designated location and catch the bus, to consolidate the number of stops and include a wider geographic spread in the bus route. The Director of School Operations will oversee the contract and relationship with service providers. Given that our anticipated student population may include a higher percentage of students with diverse needs, we anticipate that some students may need specific transportation accommodations.

(b) Food Service: Outline your plans for providing food service at the school, including whether and how you will be your own school food authority or will contract with another provider. If the school will not provide food service, please identify how the school will ensure that this does serve as a barrier to enrollment or ongoing attendance.

Food Service and Other Ancillary Services

RS-CC will act in accordance with all federal, state and local policies for providing healthy food service, including breakfast, lunch and a snack. In July 2022, RS-CC will solicit bids from food service providers and select the highest quality and most affordable provider.

The Director of School Operations will collect all necessary documentation from families who are eligible for free or reduced-price meals, and track meals via a point-of-sale system. RS-CC seeks to contract with a local vendor for janitorial services and for information technology services. In conversations with the Nevada Prep team, we have discussed sharing transportation, food services, and ancillary providers such as nursing.

(c) Facilities maintenance (including janitorial and landscape maintenance)

To date, no plans have been developed for facilities maintenance as a site has not been selected. Rooted School Clark County is working with *Charter Schools Development Corporation* (CSDC) to put together a comprehensive facilities plan.

At this time, we have a projected cost outline (below) for leasing from the CSDC. We have begun to
plan for anticipated costs in our budget for facilities, transportation and nursing services.

The Rooted School Sample Lease Proforma April 19, 2022											
nalysis Start Date 'iscal Start Date (Yr 1) Building Size (RSF):	July 1, 2022 July 1, 2023 25,000										
USES OF FINANCING						USES OF FIN/	ANCING				
	Per SF % of Total										
troperty Acquisition losing Costs	s s	3,275,000 25,000	\$ 131 \$ 1	66% 1%			Senior Debt	Seller Financing	Sub-debt (CSDC/CDFI's)	School Contribution	Total
lite Work	\$	1,300,000				Loan Amount	\$ 3,748,275	5 S -	\$ 1,249,425	S - S	4,997,700
mprovements - Hard Costs						LTC	75.05	6.0%	25.0%	6 0.0%	100%
iolf Costs (legal, loan fees, site due diligence)	12.00% \$	156,000	\$ 6	3%		Interest Rate	4.005	6 0.00%	2.25%	6	3.56%
apitalized Interest	S	50,000	\$ 2	196		AmortTerm (years)	2	5 999	25	5	25
SDC Fee	2.50% \$	118,900	\$ 5	2%		Monthly Payment	\$ 19,785				
Iontingency Iotal Project Cost	5.00% \$	72,800	\$ 3 \$ 148	1%		Annual Payment	\$ 237,417 \$ 12,494		\$ 65,390	s - s	302,807
otal Project Cost	,	4,997,700	5 148	7476		Monthly payment (I/O)					
	SOURCES OF FINANCING							andard Deal Terms:			
iources of Financing ienior Debt		3,748,275	\$ 150	% of Total 75%		15 year lease with 4 five yea Base Rent is 1.22 times debt	r renewal options	196 per super starting in sur	- 1		
ieller Financing	s	3,748,275	\$ 150	0%		2% is applied to the Purchase		7.5% per year starting in yea	23		
iub-debt (CSDC/CDFFs)	s	1,249,425	\$ 50	25%							
ichool Contribution fotal Sources	<u>s</u>	4,997,700	<u>\$</u>	0%		School or affiliates benefit fi Purchase option is 105% of		of the building			
Affordability Analysis	I	I	Year 1	Year 2	Year 3	Year 4	Year 5				
			2022-2023 12 Months	2023-24 12 Months	2024-25 12 Months	2025-26 12 Months	2026-27 12 Months	-			
rojected Student Enrollment			12 Mobuls	200	300	400	400				
ienior Debt			\$ 237,417	\$ 237,417	\$ 237,417	\$ 237,417	\$ 237,417	,			
ieller Financing			s -				s -				
lub-debt (CSDC/CDFTs)			\$ 65,390								
lotal Debt Service			\$ 302,807	\$ 302,807	\$ 302,807	\$ 302,807	\$ 302,807	1			
Debt Service Coverage			1.22	1.22	1.25	1.29	1.3	3			
tetnas a Percentage of Project Cost Annual Facility Payment (Rent)		7.39%	\$ 369,424	\$ 369,424	\$ 378,509	\$ 389,864	\$ 401,560	1			
Aurohase Option Price	1		309,424	309,424	378,509	389,804	401,500	-			
Purchase Option Price (less School Contribution)		5.00%	\$ 5,247,585	\$ 5,247,585	\$ 5,247,585	\$ 5,247,585	\$ 5,247,585				
Credit for portion of Lease/Rent increases			\$ 5.247.585	s -	\$ (6,056)	\$ (13,626)	\$ (21,424	0			
Purchase Option Price less Credits					\$ 5,241,529	\$ 5,233,959	\$ 5,226,161				

We are currently investigating sharing costs for transportation, food services and ancillary support services such as nursing with other local charter schools.

(e) Purchasing processes

EdOps will provide additional consulting services and support for payroll, accounting, operational reporting and grant strategy support to RS-CC during its planning year and operating year. The *EdOps* contract will be renewed annually if mutually agreed upon with the goal being developing:

- Nevada-Specific Financial Capacity
- RS-CC Leadership
- Board Finance Committee Goals & Outcomes

The criteria for selecting *EdOps* are listed below:

- Experience successfully building sustainable systems in the public sector (non-profits, public sector agencies, charter schools)
- Strong professional references in the field
- Familiarity with Nevada state regulations
- Demonstrated ability in understanding new contexts/regions
- Leadership in developing the RS-CC multi-year budget
 - (f) Safety and security (include any plans for onsite security personnel)

At this time, there are no plans to include on-site security personnel.

(2) Technology: Outline the technology infrastructure and support mechanisms across your school, staff, and teachers. Your outline should include but not be limited to reliable and secure wide area networking, local area networking (e.g., wireless and cables), hardware (e.g., personal computing devices, servers, telephony, storage, routers, switches), technology policies and procedures, device management, and end user support.

IT Plans

Most elective courses at RS-CC will be offered as part of our *Informational Technology Career Cluster Pathway* and are directly aligned to the proposed *NVACS for Computer Science and Integrated Technology* (CSIT). Our intention is to offer industry-based credentialing (IBC) based on the needs of our regional industry partners. All course content will be developed using industry standards and backwards-design with feedback from our Nevada tech partners and with consideration to relevant industry-credentialing assessment standards and requirements.

All CSIT course standards will be based on the NVACS below:

- Digital Citizen
- Knowledge Constructor
- Innovative Designer
- Computational Thinker
- Creative Communicator
- Global Collaborator
- 5-School Star Rating
- Local, State & National Assessments

As RS-CC is a school designed with a strong emphasis on technology, 1:1 computing is essential. Each student will be issued a robust laptop computer for use at home and in school. They will also be granted use and access to industry standard desk stations within the school facility.

*Please refer to the *Director of School Operations* Job Description/Job Responsibilities under the Leadership Team section of this reapplication as well as ATTACHMENT 7.

(3) Student Information Management: Timely communication of accurate student information is critical for payments to schools, compliance, and performance monitoring. Please describe how you will manage student information using the statewide Infinite Campus system, and how you will build capacity around the use of the software. If most of the applicant group or the CMO/EMO is new to operating in Nevada's education environment, explain your plan to determine Nevada specific reporting requirements. Detail the staff members who will enter data along with the project manager who will commit to trainings and regularly monitor student information for accuracy.

The school leader will select *Infinite Campus* as its SIS platform to meet its model's unique needs around tracking academic and behavioral progress. We will contract with the vendor to price and arrange for training for all administration, front office management and teaching staff.

(4) Data Security: SPCSA charter schools record, generate and consume data that falls under strict requirements for security, privacy, and retention (including FERPA and recent legislation related to the protection of personally identifiable information (PII)). Describe the systems and procedures you will implement in order to ensure you are compliant with these obligations.

RS-CC will provide high-speed Internet access at home (where applicable) and in school using appropriate funding streams and select budgeting. This includes the purchase of firewall protections to ensure system security and to make certain that students are not accessing sites that may be deleterious to the culture of the school and/or to the technology infrastructure or backbone of RS-CC. More important than ever, in the current environment of remote/distance learning, the school will have a Child Internet Protection Act policy, required for all K-12 schools that receive federal funding. We will also have a local school technology policy to ensure students are not exposed to offensive, violent or mature content while using the Internet.

All IT plans for RS-CC will be in complete compliance with NRS 385A.800, NRS 385A.070 and NRS 385A.400. We will partner with the required SIS Infinite Campus to offer professional development and to ensure the capacity to provide and report key information about our students' academic progress and overall school accountability.

Care will be taken to ensure unique identification for each pupil and to comply with all privacy laws (FERPA) and SPCSA guidelines relevant to the maintenance and transmission of electronic information in a school setting, particularly as they relate to:

- Academic Achievement
- Attendance Rate
- Graduation Rate

(5) In addition to the narrative above, provide as Attachment 15, an operational execution plan, which identifies the key organizational business processes necessary to support exemplary academic, business and financial performance including those discussed in this narrative. This

operational execution plan may be in a format of your choosing, and may include Gannt charts, process maps or flow charts, or other appropriate illustrative devices in addition to a coherent and well-developed narrative.

*Please see ATTACHMENT 15 as well as the narrative below.

Partnerships Central to RS-CC Operations

- I. *Whole Village Art Therapy* will provide free art therapy to all RS-CC students whose families consent. Whole Village's approach has serviced Rooted School—New Orleans by gradually reducing the frequency of major behavior incidents each year, supporting student and adult mental health and offering guidance on the formation of new disciplinary practices to support struggling learners.
- II. **Board on Track** will provide consulting for governance support and CEO coaching to RS-CC's Board of Directors and to its school leader via its "Acceleration" membership offering.

Criteria for selection:

- Experience successfully coaching over 500 charter school boards nationwide
- Strong references from Washington state charter school leaders
- Familiarity with Nevada governance regulations
- Provide a unique charter board-specific dashboard to track board meetingdocuments, policies and performance goals
- The school leader will also be working throughout the incubation year on student recruitment efforts that ensure we achieve our enrollment target each year.

When possible, the school leader will prioritize janitorial, security and other operational support vendors local to or familiar with Clark County, Nevada and/or familiar with charter schools.

Additional criteria will be finding vendors that can meet the schools' bussing needs.

FACILITIES

(1) Describe the facility needs of the proposed school for each year of the charter period including any unique features necessary to implement the school design and academic program including:

(a) The desired location of the school facility;

Rooted School Clark County is working with *Charter Schools Development Corporation* (CSDC) to put together a comprehensive facilities plan. Please see the intended zip codes to be served for preferred locations.

(b) The number of general education classrooms required each year;

We will likely need at least 4 – 5 classrooms and at least one office each year for the first 3 – 4 years.

(c) Any additional classroom space required for special education or ELL services, labs, specialty classes and intervention or enrichment programs;

Of the 4 – 5 classrooms projected above, one will be dedicated for special education and ELL services throughout the day. This room will be used for individual and/or small group study and instruction.

(d) Space requirements for administrative functions, food services and physical education

Only one room or open space area would be required for administrative functions.

Food services will be accommodated based on the facility and the type of food service provider selected in the opening years of RS-CC.

(2) If a facility is not yet identified, please describe the organization's approach to finding a suitable facility, including progress to date, partners, and any evidence that supports the credibility of the plan. Please include the organization's plans to finance the facility, including:

- (a) Total project cost
- (b) Financing and financing assumptions
- (c) Total facility costs that the financial model can handle debt service + lease + maintenance + utilities + etc.

Please find the above information in this proposal from CSDC on the following pages.



The Rooted School Proposed for Clark County, Las Vegas, Nevada

Term Sheet- to acquire and improve the real property located at Nevada a to be determined location in a high priority zip code in Las Vegas, Nevada for a charter school facility for Lease with Option-to-Purchase to The Rooted School (hereinafter referred to as "ROOTED", "Lessee", "Tenant", and "School" interchangeably).

This Term Sheet outlines the terms under which CSDC Property Corporation (hereinafter referred to as "CSDC", "Landlord" and "Lessor" interchangeably), is prepared to acquire and improve the real property to be determined ("Property") for Lease with Fixed Purchase Option to ROOTED ("Lease"). The Improvements will be performed by CSDC. The acquisition and Improvements may be referred to as the "Project". The Project will be financed on CSDC's balance sheet, with no contribution required by the School.

Although the Property has not been identified, for purpose of this Term Sheet, an assumed initial Total Project Cost (defined below) of \$5,000,000 has been assumed. This amount is for illustrative purposes only. Please see the Project Pro Forma attached hereto as Exhibit A and incorporated by reference.

- <u>Total Project Cost</u>. As used herein, the term "Total Project Cost" means the aggregate of the actual, complete and final ("all-inclusive") cost of the Project including, but not limited to: the Property acquisition cost and all related closing costs; architectural, engineering and legal fees; application and permit fees and any other predevelopment soft costs associated with the design of and specifications to suit Lessee's needs and/or to obtain the requisite governmental approvals for the Project; off-site improvements and horizontal on-site improvements; the hard cost of construction of the vertical improvements; all capitalized interest any and all property taxes due and payable during construction of the Project; payments to third parties for title insurance, surveys and other due diligence, and operating expenses prior to the completion of the Project; and the cost of the interior "finishings" and building fixtures (but excluding moveable furnishings and equipment).
- <u>Purchase Option</u>. Lessee may exercise its Option-to-Purchase <u>at any time</u>, beginning at the Lease Commencement, at a purchase price equal to 105% of the Total Project Cost, less any credits afforded through lease increases.

The Lease shall include, but not be limited to, the following terms:

<u>Lessee.</u> The Rooted School

<u>Landlord.</u> CSDC Property Corporation (or an affiliated LLC)

7880 Milestone Parkway, Suite 425 - Hanover, MD - 21076 - Tel (410) 561-1280 - Fax (443) 561-1281 - www.csdc.ore

- <u>Term of Lease</u>. Fifteen (15) years, with four, five (5) year options for Lessee to extend provided the Lease is not in default.
- Lease Payments. Lease payments will be based on 1.22x Landlord's debt service, with annual
 escalations beginning on the first day of the third Lease Year, and continuing for each Lease Year
 thereafter, equal to 1% of the prior Lease Year's annual rent. See attached Exhibit A, based these
 assumptions, Lease Payments are approximately
- <u>Operating Costs (Additional Rent)</u>. The Lease is an absolute net lease ("NNN"). All costs of
 operating and maintaining the Property and Improvements, including, but not limited to, real
 estate or property taxes, insurance, maintenance and repairs, and utilities, are the responsibility of
 the Lessee and are to be paid directly by Lessee. Landlord shall have no responsibility for any
 costs associated with the Property or Improvements.
- Lease Commencement. The Lease shall commence on the later of July 1, 2023 or when the building has been certified for occupancy.
- <u>Security Deposit</u>. The Security Deposit shall be equal to one months' rent and due at Lease Commencement. The Deposit will be held by Lessor subject to such conditions and restrictions (if any) required by Nevada law and may be used by Lessor for payment of delinquent Rent or for any other monetary obligations of Tenant to Lessor under the terms of the Lease. The Deposit shall not accrue interest in favor of Tenant.
- <u>Build-to-Suit Improvements</u>. Landlord agrees to design and construct the improvements to
 specifications agreed upon by Lessee and Landlord. Lessee agrees to provide its written approval
 of the plans and specifications for the Improvements in a timely fashion. Once the plans for the
 Improvements are approved, any changes are subject to Landlord's sole and absolute discretion.

All Improvements undertaken by Landlord will be those requested by Lessee and mandated by law and applicable building code requirements for public charter schools in the City of Las Vegas, Clark County and or the State of Nevada.

Landlord will apprise Lessee of the cost to construct the Improvements and provide documentation thereof.

- <u>Developer's Fee</u>. Upon acquisition, Landlord shall have earned a Developer's Fee equal to 2.5 % of the Total Project Cost. School may elect to pay the Developer's Fee in full at the Lease Commencement Date, or may elect to capitalize the Developer's Fee into the Project's financing, in which event, the School shall pay the Developer's Fee in equal monthly installments equal to 2% of the prior year's monthly rent payment, beginning on the first day of the third Lease Year and continuing thereafter until the Developer's Fee has been paid in full. Any unpaid portion of the Developer's Fee is due and payable upon exercise of the purchase option with any Developer's Fee payment(s) credited to, and deducted from, the Purchase Option Price at such time.
- <u>Design and Construction of Improvements</u>. Landlord shall select and engage the architect, general contractor, engineers, and all subcontractors to construct the improvements while complying with any applicable bidding or procurement laws and regulations. Landlord will provide owner's representation and retain ultimate construction/project management oversight responsibility.

- <u>Landlord's Right to Approve Assignment</u>. Landlord shall have the right to approve of any
 assignment of the Lease and any assignee of ROOTED, which approval shall be granted or
 denied in Landlord's sole and absolute discretion.
- <u>Use of Property</u>. The Property shall be used as a public charter school and affiliated activities (after school, student clubs, daycare or preschool included) and for no other purposes without Landlord's consent.
- <u>Insurance</u>. Lessee is to provide, at its expense, adequate fire, casualty, liability and such other
 insurance as may be required by the Landlord for the Property. At least five (5) days prior to
 Lease Commencement Date, the Lessee will deliver to the Landlord for its approval, policies or
 binders evidencing such insurance, and that such insurance policy premiums have been paid to at
 least one year in advance. Certificates of Insurance are not acceptable as evidence of compliance
 with this section. Furthermore, the Lessee shall, at its expense, maintain such policies during the
 term of the Lease in such amounts as may be required by the Landlord.

Each policy of insurance shall name the Landlord, and senior lender if necessary, as loss payee on Lessee's hazard insurance and as an additional insured party on Lessee's liability insurance policy, and shall provide that such policy may not be surrendered, canceled or substantially modified, without the insurer providing at least thirty (30) days prior written notice thereof to all parties named as insured or loss payee therein, including Landlord. The policies of insurance shall be in such amounts and with deductibles as determined by Landlord in its sole and absolute discretion.

Each policy shall include a "guaranteed replacement cost" clause, which eliminates any deduction for depreciation, and an "agreed amount" clause, which removes the co-insurance provision.

- <u>Reporting Requirements</u>. As Federal grant funds will support this Lease the following are required of the School:
 - i. School covenants and agrees to provide the expected enrollment and actual enrollment as calculated by including each student considered as participating in the School as a result of the most recent count and official enrollment report required by the School's Authorizer a ("Granting Authority") or other such agency as designated by the laws of the State of Nevada to collect and verify enrollment data from public Charter Schools.
 - ii. Within forty-five (45) days of the end of each school year, School shall also provide to Landlord an annual report documenting (i) the previous school year's progress in meeting the performance-based goals identified in School's charter application and (ii) all State-mandated test scores and performance assessments and other accountability indicators, including proficiency rates and other results as required under the federal Elementary and Secondary Education Act (for so long as such statute applies to public charter schools).
 - iii. Within thirty (30) days following its annual issuance but no later than one hundred and sixty (160) days after the end of School's fiscal year, School shall provide to Landlord a copy of its annual audited financial statements. In addition, at the earlier of August 1st of each Lease Year or within thirty (30) days after submittal to the

State, School shall provide to Landlord a copy of its annual operating budget, as approved by the School's governing board and submitted to the State.

- iv. On the first day of each Lease Year, School shall provide to Landlord documentation from the Granting Authority its charter that School is in good standing under its Charter Agreement. School shall also provide to Landlord any and all documentation related to the continuation or renewal of the School's charter, including but not limited to periodic compliance reviews by the Granting Authority.
- v. Within forty five (45) days of the end of each fiscal quarter, School shall provide its quarterly unaudited financial statements prepared by an independent CPA or licensed Business Manager of recognized standing.
- vi. School shall also provide such other documents and instruments as Landlord may reasonably require.

In the event Lessee exercises the option to purchase the Property, the following will apply:

- Evidence of Title / Deed. Within thirty (30) days following the execution of a mutually
 agreed Purchase Agreement, the Seller will produce such deeds and affidavits as required by
 the title company and shall be in recordable form acceptable to Purchaser's and Seller's
 counsel subject only to title exceptions acceptable to Purchaser and any liens or
 encumbrances created by Purchaser.
- <u>Taxes, Assessment and Closing Costs</u>. Real estate taxes, if applicable, due and payable during the year in which the Closing or real estate taxes becoming a lien during the year in which the closing occurs shall be paid by Landlord.

<u>Confidentiality</u>. Landlord and School agree to keep confidential the terms hereof and any terms or conditions agreed to in any subsequent letter of intent or correspondence as well as any proprietary information shared between both parties. Notwithstanding anything herein to the contrary, School and Landlord are expressly permitted to share this Term Sheet and documents referred to herein with board members, attorneys and other advisors. If the terms described herein are acceptable, CSDC shall propose a formal LOI and Predevelopment Services Agreement to formalize the relationship.

(3) If you currently hold a facility or have an MOU or other proof of intent to provide a facility, please provide the proof of commitment as Attachment 16. Briefly describe the facility, including location, size, and amenities. You may provide, included with Attachment 16, up to 10 pages of supporting documents providing details about the facility. Charter school facilities must comply with health and safety requirements. In addition, charter school applicants must be prepared to follow applicable county and municipal review procedures which vary significantly between jurisdictions. If the applicant does not yet have a facility identified, please upload an attestation explaining that these materials will be furnished as part of a charter contract amendment.

*Please refer to ATTACHMENT 16

(4) Describe the organization's capacity and experience in facilities acquisition and management, including managing build-out and/or renovations, as applicable.

Rooted School has a good deal of experience in managing existing facilities (i.e. Rooted School New Orleans) as well as developing is currently developing and building out a middle / high school facility in conjunction with Eastern Star Church – ROCK Initiative in Indianapolis.

Eastern Star Church has collaborated with Rooted by leveraging the church and community resources to help improve the educational institutions on Indianapolis' eastside, a community largely made up of minority families with some of the lowest graduation rates and highest unemployment rates in Indianapolis.

Through this partnership Eastern Star created the pre-k to college pipeline for students in the 46218 zip code. Finally, Rooted School Indy has worked with Eastern Star Church to design a 60,000 sq. ft. educational facility that will house Rooted Jr. High and Rooted High School beginning in the fall of 2024.

(5) Explain the organization's plan to maintain the independent facility.

A maintenance plan will be developed as facilities information and square footage data are more readily available.

(6) Communication with local jurisdictions and municipalities is important when opening up a new charter school. In some cases, municipalities may have additional processes that are required, or may request information from proposed charter schools. Please explain, in detail, the applicant team's interactions with the local jurisdiction to date. Specifically, the applicant should clarify if a proposed school is approved for final land use from the local government entity, as well as describe any other pertinent topics related to the facility (ex. queueing for drop-off and pick-up, providing sufficient recreation space). If the applicant has approval from the local jurisdiction for the proposed location, please provide that as part of Attachment 16 to the final application.

To date, there have been no communications with either the jurisdiction or the municipality regarding the opening of a Rooted School in Clark County, Nevada. These conversations will take place immediately pending the charter approval from SPCSA.

ONGOING OPERATIONS

(7) SPCSA schools coordinate emergency management with local authorities. Explain your process to create and maintain the school's Emergency Management Plan required by the State of Nevada. Include the types of security personnel, technology, equipment, and policies that the school will employ. Who will be primarily responsible for this plan?

Emergency Management Plan

The Emergency Management Plan will be managed and fully developed by the School Leader and Director of School Operations according to the Nevada Revised Statues (NRS) 388.229 through NRS 388.261 and NRS 394.168 through NRS 394.1699. These will act as the foundation and guidelines for the crisis and emergency response plan- <u>https://doe.nv.gov/Emergency_Management/Home/</u>.

Health and safety have never been more critical in schools, given the COVID-19 pandemic that we are currently facing. Adhering to all federal, state, county and city health and safety laws, RS-CC will provide a compliant, safe and healthy learning and work environment.

All faculty will be trained in general health and safety protocols as well as key emergency procedures like universal precautions, CPR, defibrillator, etc. Further, upon securing a facility, or no later than 90 days prior to operation, the board will adopt a comprehensive set of health, safety, and risk management plans and procedures. These will be created with guidance from the school nurse and SPCSA guidelines.

All health and safety policies will include plans for COVID-19 related health and safety procedures related to social distancing, use of personal protective equipment and procedures for regular cleaning and in the case of a confirmed COVID-19 case. Moreover, these policies will be developed in consultation with the school's insurance carriers and Nevada's police, fire and health department requirements. The policies will be distributed as appropriate via handbooks and the school's website.

The school facility may be equipped with an alarm system, and if necessary, a security camera or a security guard. Entry and exit from the school building will be monitored during the day—particularly upon opening. All doors, with the exception of the main office door, will then belocked. All guests must register at the main office upon entry to the building and wear a visitor badge with ID verification. Faculty will be equipped with badges.

RS-CC will implement the following:

- **Procedures of Background Checks**: Board members, employees, and contractors at RS-V will be required to submit to a criminal background check and furnish a criminal record summary as required by Nevada code.
- **Role of Faculty as Mandatory Child Abuse Reporters**: All RS-CC faculty will be mandated to report child abuse and will follow all applicable reporting laws. They will be notified of this requirement during summer professional development and in the RS-CC School Personnel Handbook.

- **Immunizations and Mandatory Health Testing**: RS-CC will adhere to laws related to legally required immunizations and a health screening for entering students and faculty. Board of Directors will adopt required procedures for medical records and medication, with the exception of the over-the-counter medications Ibuprofen and Acetaminophen, which the school nurse (or designee) will be able to dispense, as needed, with parent permission.
- **CPR, AED & First Aid Training**: All RS-CC employees will hold current CPR and First Aid and AED certification.
- **Vision and Hearing**: RS-CC will adhere to all federal and state mandated testing as applicable to grade levels served.
- **Blood-Borne Pathogens**: RS-CC shall meet state and federal standards for addressing
- blood-borne pathogens and other potentially infectious material in the workplace. RS-CC will establish a written infectious control plan designed to protect employees and students from possible infection due to contact with blood-borne viruses, including human immunodeficiency virus (HIV) and hepatitis B virus.
- **Drug-Free and Smoke-Free Environment**: RS-CC is a drug, alcohol and smoke-free environment.
- **Comprehensive Harassment Policies and Procedures**: RS-CC is committed to providing a school that is free from sexual harassment, as well as any harassment based on such factors as race, religion, creed, color, national origin, ancestry, age, medical condition, marital status, sexual orientation or disability. RS-CC will adopt a comprehensive policy to prevent and immediately remediate any concerns about discrimination or harassment to include all interactions between and among students, employees and volunteers.
- **Emergency Preparedness**: RS-CC shall adhere to an emergency preparedness and crisis plan drafted specifically to the needs of the school site in conjunction with law enforcement and the fire marshal. Emergency response will be part of RS-CC 's emergency preparedness. This plan includes the following responses: fire, flood, earthquake, terrorist threats, and hostage situations. All RS-CC faculty will be trained on site safety plans. RS-CC will act in accordance with all federal, state and local policies for practicing lock-down drills, shelter-in-place drills and off-site evacuation drills.
- **Facility Safety**: RS-CC will act in accordance with all federal, state and local policies regarding environmental health and safety standards for school facilities. The school agrees to maintain visitor policies, test sprinkler systems, fire extinguishers and fire alarms annually to ensure that they are maintained in operable conditions at all times.

RS-CC's proposed board and Rooted School Foundation's collective leadership teams share a national reputation and over 70 years of a wide range of experiences and expertise that qualify them to launch and lead RS-CC to reach its mission and vision. This Rooted leadership team has successfully launched Rooted School—New Orleans (RS-NO), Rooted School—Indianapolis (RS-I), Rooted School-Vancouver Washington (RS-V). Each member—Jonathan Johnson, Frank Ingargiola, and Kaitlin Karpinski (see Competency Table and Bios in this application) will contribute their expertise in staffing, professional development, performance management, general operations, facilities management and state/federal compliance.

(8) Provide, as Attachment 17, a list of the types of insurance coverage the school will secure, including a description of the levels of coverage. Types of insurance should include workers' compensation, liability insurance for staff and students, indemnity, directors and officers, automobile, and any others required by Nevada law or regulation.

Please see ATTACHMENT 17.

Financial Plan

(1) Describe the systems and processes by which the school will manage accounting, purchasing, payroll, and audits. Specify any administrative services expected to be contracted for the school and describe the selection process and criteria for the selection of contractors.

Rooted will develop effective, high-quality systems, policies and processes for financial planning, accounting, purchasing and payroll, including the establishment and maintenance of strong internal controls and capacity that comply with all financial reporting requirements of Rooted's charter contract and the SPCSA guidelines. Policies and procedures for financial planning will be finalized by the board of directors led by the finance committee in collaboration with the Rooted school leader, Rooted School Foundation, andour back-office service provider.

The school leader will be expected to monitor the day-to-day academic budget, cash flow and any other relevant financial information. He/she will also be expected to consult with the board finance committee as well as the chief financial officer (once hired) and/or the contracted back office service provider(s) on a monthly basis.

As an additional layer of financial support, we will utilize financial and budgeting consulting services from EdOps, a national back-office service provider with extensive charter finance (local and national), expertise, to support the school leader:

EdOps 1611 Connecticut Ave. NW, Suite 200, Washington, DC 20009 (202) 352-7878 |

RS-CC plans to utilize EdOps for accounting and CFO consulting support during its planning year and perhaps beyond. This will ensure continuity in vendors and strategic support from planning to operation. The board will receive monthly financial reports delivered by its treasurer, with support from the standing finance committee. All parties named will be responsible for completing detailed quarterly reviews in addition to the board's monthly financial/budget report.

The school leader, with support from EdOps and Rooted School Foundation will prepare all annual budgets. These are reviewed with the local administration, teaching staff, the leadership team at Rooted School Foundation and the board's finance committee. The budget will then be presented to the full board of directors at a public board meeting for approval. In addition to presenting the one-year budget in detail, the school leader will be responsible for developing and presenting a presumptive, five-year model for context and planning.

All policies and procedures regarding accounting, purchasing and payroll will be aligned to, and will comply with, all applicable local, state and federal regulations regarding the use of public funds. The goal is to establish and maintain strong internal controls. This includes policies and procedures in accordance with RS-CC's charter contract and the SPCSA.

In addition, Rooted will look to the SPCSA for examples of model policies and procedures. Financial

policies, procedures and controls will be reviewed annually or more frequently if needed, to ensure that updates to the accounting policies are promptly adopted by the board.

Accounting

Rooted will follow all accounting procedures recognized and mandated by generally accepted accounting principles (GAAP), Government Accounting Standards Board (GASB), and the state of Nevada. Accrual-based accounting will be used with appropriate general ledger codes, along with account segments capable of reporting on subcategories such as revenue source, department and other areas to be determined. RS-CC will work with its back-office provider and CFO consultant toset up streamlined accounting systems that work in concert with state reporting platforms.

Purchasing

All purchases of goods and services must be consistent with the board-approved budget and do not require a board-approved/executed contract, with the exception of expenditures that exceed the budget by an agreed upon material amount.

All other proposed expenditures must be approved by the person who reviewed the expenditureto determine whether they are consistent with the board-adopted budget. Purchase orders under \$25,000 must be approved by the school leader and be consistent with the board-approved budget.

Purchase orders and invoices of \$25,000 or more must be approved by the board chair and one of the following authorized positions:

- Board treasurer
- School leader

All check requests and purchase orders must be signed by the person reviewing the expense.

In general, invoices will be reviewed and signed according to the procedures outlined below to ensure the items were properly requisitioned and maintained and to document check processing. Open invoices will be paid in a timely manner unless delayed payment is arranged through the vendor, in which case, the school will meet payment schedules as outlined.

Expenditures of up to \$5,000 must be authorized by the director of school operations and the school leader. Electronic payment methods (i.e., wire transfers, ACH, transfer between bank accounts) will be reviewed by the board's finance committee and must follow ordinary procurement procedures.

All professional consulting services shall be provided under a contract. Contracts for other goods and services exceeding \$25,000 on an annual basis shall be presented to the board for approval during the annual budget cycle or prior to signing. The duration of contracts shall be at the discretion of the board. In general, contracts exceeding \$25,000 shall be reviewed after a bidding process of sufficient duration to ensure competition. Bid tabulations shall be presented to the board, along with a recommendation for action.

The board reserves the right to select whichever vendor it deems most prepared to provide the required goods or services, without consideration of low bid being the mandate. School credit cards shall be allowed for school purchases and travel. Authorized purchasing cardholders are the school leader and the director of school operations. All credit card charges must follow ordinary procurement procedures.

Employees shall be reimbursed for all necessary and reasonable costs associated with traveling for school business. All applicable receipts must be attached to a completed expense report. Reasonable costs of meals while traveling is reimbursable using standard U.S. government per diem rates for the city in which an employee is staying for one, two or three meals per day, depending on the circumstances of a particular trip.

Under no circumstances shall alcohol be reimbursed. Employees are reimbursed for the cost of single-room accommodations typically occupied by business travelers. When lodging expenses will exceed standard U.S. government per diem rates for the city in which an employee is staying, that employee must receive advance approval for the cost of their lodging. In certain circumstances, employees may choose to be accompanied on business travel by a spouse/domestic partner. At no time will the school reimburse an employee for costs incurred for the travel expenses of the spouse/domestic partner.

No board member or employee may authorize a reimbursement request made payable to themselves. Reimbursements payable to the school leader are approved by either the board chair or the treasurer.

All employees are reimbursed at the standard mileage rate per mile as determined by the IRS for use of their own vehicle for business-related travel preapproved by their supervisor. In addition, parking fees and tolls are reimbursable if supported by receipts. All employees requesting such mileage reimbursement are required to furnish an expense report containing the destination of each trip, its purpose, and the miles driven, as well as parking fees and tolls within one month after the travel date, supported by receipts, if applicable.

Other transportation expenses such as taxis, rental cars, buses, and airplane tickets will be reimbursed for the actual costs incurred. Fines and parking tickets are not reimbursable. Use of school funds for personal use is prohibited. Violation of this policy shall result in discipline up to and including dismissal or removal, including from the board.

Payroll

Salaries and benefits will align with the approved annual personnel budget. Employees will accruevacation and sick leave based on a board-approved personnel policy; this policy will be available in the RS-CC *School Personnel Handbook*. The director of school operations will develop procedures to ensure accurate and timely preparation of timesheets for hourly employees. RS-CC intends to either contract with a payroll services provider or incorporate this responsibility into the projected back-office provider.

RS-CC is an at-will employer and will have employee contracts. RS-CC leadership will develop a written School Personnel Handbook and will include expectations for employees and RS-V as an employer regarding fulfilling RS-V's vision, mission and principles.

Internal Controls

RS-CC's core finance team, which includes the school leader, treasurer and the board finance committee, will ensure timely and accurate reporting, adequate safeguarding and stewardship of all assets and compliance with all legal requirements, as well as ensure the ethical and transparent presentation of information.

The finance team will meet monthly to review compliance with established policies and procedures and to recommend improvements. Any inconsistencies in the application of internal controls will be immediately reported to the board. RS-CC will, as authorized by the board, establish a commercial bank account for the purposes of school operations. Funds will be deposited in non-speculative accounts including federally insured savings and/or checking accounts, and/or invested in non-speculative federally backed instruments and/or standard money market accounts. RS-CC will also have a general checking account for school needs. The board chair, board treasurer, and school leader will be authorized signatories on this account.

The back-office provider will reconcile all bank accounts monthly. Reconciliations will then be reviewed and approved by the director of school operations who does not have the ability to approve expenses or disburse funds from the account. The monthly bank reconciliations will be reviewed by the board /and or a representative of the board who is not an authorized approver of expenses or signer on behalf of the school.

The board chair, board treasurer, and school leader will be designated signatories on the school's savings account. Petty cash will not be made available. Cash balances and reserves will be invested in federally insured, fiscally conservative, interest-bearing accounts. The school will deposit all funds received as soon as practical upon receipt.

The director of school operations will open all mail daily, sort and endorse all checks to the appropriate school account as well as prepare appropriate deposits as soon as practical, ideally the same day and no more than three days. When cash is received, it will be counted by at least two employees; they will both verify the amount received and sign a cash deposit form indicating the performance of their duties.

Roles and Responsibilities

Rooted's financial planning team includes:

- Board finance committee
- School leader
- Director of school operations
- Back-office service provider
- CFO consultant / EdOps

The school leader will work regularly with the EdOps consultant to monitor the budget, analyze budget versus actuals and variances, monitor cash and provide real-time access to all financial data. This practice will ensure that the school leader has significant ownership over the school-site budget.

All budgets will be created by the school leader and/or the CFO and theback-office service provider.

Activity	School Leader	School Leader & Director of School Operations	Back Office & Consulting CFO (EdOps)	Board of Directors	
Budget	Makes proposal	Leads development	 Provides input & support 	Finance committee reviews/board approves	
Audit	Provides input	Leads process	 Provides input & support 	Audit committee reviews/board approves	
AR/AP Banking	Signs checks below \$5000	Leads process Approves all invoices Deposit checks	 Bank reconciliation Enters invoices Prints checks Enters deposits 	Signs all checks above \$5000 Reviews balance sheet	

Budget Monitoring	Variances and forecasts reviewed 2x monthly	Leads process	 Variances and forecasts reviewed/ provided monthly 	Finance committee reviews monthly	
Payroll	N/A	Leads process	 Completes payroll and tax payments Files monthly reports (DRS, SEBB, etc.) Reviews all compensation 	Approval of school leader compensation	
Cash Management	N/A	Leads process	 Consults as needed on loans Monitors bank cash balance 	If any loan is needed, board approval is required	
Authorizer Reporting	Provides input Leads process		 Provides input, collation support & final review 	Approval when required	

Transparency

The board will adopt a fiscally conservative budget well in advance of any required deadlines by the authorizing entity. During the year, the board may amend the budget as expenses and revenue projections change.

Prior to RS-CC's first year of operation, RS-CC staff and the board shall start the budget adoption process in January 2023 by creating a list of budget priorities and/or reviewing the current budget priorities balancing input from key stakeholders while focusing on the core mission of RS-CC. This proposed budget will be provided to the RS-CC board of directors at the end of March 2023 and will be based on conservative assumptions for state and federal education revenue. The board will discuss the budget at an open board meeting in April 2023. The meeting will be publicized to families and various community stakeholders at least 30 days in advance so that interested parties can attend the budget-related board meeting(s). School leadership will submit a final budget for approval by the board by the end of August 2023.

RS-CC will adhere to the accounting, auditing, and reporting procedures and requirements that apply to public charter schools operating in the State of Nevada. This will include all reporting requirements of the charter contract as well as an annual audit of financial and administrative operations by an independent auditing firm.

This audit is conducted in accordance with applicable GAAP and GASB standards. The board will contract with a qualified, independent audit firm, chosen in compliance with state laws and regulations, to perform an audit each year on the close of the prior year's books and in advance of the statutory audit deadline. In keeping with recommended best practices, RS-CC will contract with a new audit firm after three consecutive years of working with the same audit firm.

Audits must include:

- Accuracy of the school's financial statements including balance sheets, income statements, and cash flow statements
- Attendance accounting and revenue claims practices
- A report on internal controls practices
- If more than \$750,000 of revenue is secured from federal sources, the audit will be prepared in accordance with all federal guidelines

Accuracy of the school's financial statements including balance sheets, income statements, and cash flow statements

After the audit, the board, the school leader, and the director school operations will review any audit findings and requests and adopt all corrective action(s), if required. Auditors will assist in the preparation of Internal Revenue Service (IRS) Form 990 (Return of Organization Exempt from Income Tax) and send a copy to the school staff responsible for the audit. The school leader will review and send a copy to the board for its review and approval before filing. Once approved by the board, the school leader will notify the audit firm to prepare the final return for filing.

Rooted will also be subject to performance and financial audits by the Office of the Nevada State Auditor. These audits may not be annual, but all financial periods will be covered when the audits occur. State audits may include any combination of financial reporting, Federal A-133 testing, and risk-based procedures. As the school is subject to the Nevada Open Public Meetings Act (OPMA), all board discussion and adoption of the budget will be completed during public board sessions.

Annual audits and any significant findings will likewise be presented during public board meetings. In keeping with IRS guidelines, copies of Form 990 will be made available to the public.In addition, in keeping with recommended best practices, RS-CC will publish the upcoming fiscal year's board meeting schedule, board agendas (as they become available), board meeting minutes, and a process for making a public document request on its website.

RS-CC financial documents will be available to the SPCSA and to the public upon request and meet all financial requirements of the contract.

Additionally, as regular practice, the board will:

• Review and approve the budget in a public meeting

- Review quarterly financial reports including budget versus actuals and balance sheet in a public meeting
- Review and approve the independent audit in a public meeting
- Review and approve the 990 in a public meeting

Fundraising and Development

Until the school leader is hired and the educational partnership agreement is executed, the founder and CEO of Rooted School Foundation and the Rooted School—Clark County board will lead all fundraising efforts. Given this track record of success and Mr. Johnson's local and national funding relationships, the RS-CC board is confident in the organization's ability to raise funds.

Since 2014, when Rooted School—New Orleans was founded, Mr. Johnson has raised over \$4,500,000. He has led all fundraising efforts for Rooted School—New Orleans, Rooted School—Indianapolis and Rooted School—Vancouver. In 2019, *Charter School Growth Fund* made the earliest investment in a multi-state school replication when they decided to partner with Rooted School Foundation.

(2) As Attachment 18, present a budget narrative including a detailed description of assumptions and revenue estimates, including but not limited to the basis for revenue projections, staffing levels, and costs. The narrative should specifically address the degree to which the school budget will rely on variable income (e.g., grants, donations, fundraising, etc.). Include the following:

- (a) Per-Pupil Revenue: Use the figures provided in developing your budget assumptions.
- (b) Anticipated Funding Sources: Indicate the amount and sources of funds, property or other resources expected to be available through banks, lending institutions, corporations, foundations, grants, etc. Note which are secured and which are anticipated and include evidence of commitment for any funds on which the school's core operation depends. If corporate, foundation, or other entity or individual fundraising estimates are included at \$5,000 or more in any year, be sure to include a copy of any conditional or other commitment letter(s) to support the amount assumed in the budget. Designate in the narrative how much of the anticipated funds may be restricted, such as for a sports field or art equipment.
- (c) Anticipated Expenditures: Detail the personnel and operating costs assumptions that support the financial plan, including references to quotes received and the source of any data provided by existing charter school operators in Nevada or other states and required contributions to the Public Employee Retirement System (PERS).
- (d) Discuss in detail the school's contingency plan to meet financial needs if anticipated revenues are not received or are lower than estimated, including both the scenarios identified in subsections e and f.
- (e) Year 1 cash flow contingency in the event that state and local revenue projections are not met in advance of opening.

- (f) Year 1 cash flow contingency in the event that outside philanthropic revenue projections are not met in advance of opening.
- (g) Applicants that choose to project revenue from Federal Title Programs (I-IV), Federal IDEA, state special education, and state weighted funding streams should include information in their budget narrative regarding:
 - How the projected number of students in each applicable subgroup was determined
 - How the school will ensure federal grant funds, state weighted funds, and state special education funds are used in alignment with applicable requirements (ex. Allowable and reasonable expenses, supplement vs. supplant)
 - How the school will adapt if the student population is different than the projection and/or if the per-pupil allocation is different than anticipated

Note: State special education and weighted funding are based on validated prior year enrollment counts; new schools in the first year of operation do not receive these funds.

Please see ATTACHMENT 18.

(3) Submit the completed Financial Plan Workbook for the proposed school as Attachment 19.

Please see ATTACHMENT 19.

(4) Describe the annual audit of the financial and administrative operations of the school. Discuss the planned financial controls and their implementation plans. Include evidence that the school will adhere to the accounting, auditing, and reporting procedures and requirements that apply to public schools operating in Nevada.

In developing your budget, please ensure that the school does not operate at a loss during any year—this is prohibited by Nevada law.

(5) <u>Addendum</u>

Please complete the following addendum if you are either:

- A start-up applicant (committee to form) seeking to contract with a non-profit charter management organization (CMO) or for-profit educational management organization (EMO), OR
- An experienced Non-Profit CMO applying for sponsorship directly.

If you are not sure whether you are required to complete this Addendum, please contact Mark Modrcin at <u>mmodrcin@spcsa.nv.gov</u> prior to final submission.

READINESS TO GROW

This section applies to start-up applicants seeking to contract with a CMO/EMO and to experienced CMO applicants.

(1) Describe how the CMO/EMO evaluates readiness for expansion and what evidence the CMO/EMO has that it is ready to expand.

Rooted School Foundation Evaluates its readiness for expansion using the RSF Greenlighting tool provided in the upload. The RSF Greenlighting tool allows the RSF Board to assess readiness across the following strands: Academic Results & Model Fidelity, Organizational Health, Financial Standing, Enrollment, Community Input, Support & Development, Facility Costs & Concerns, Fundraising Potential, Mission Alignment & Focus. Please see a copy of the RSF Greenlighting tool in the upload.

Evidence that RSF is ready to grow in partnership with the Clark County community also includes the following:

- 100% of students in RS-NOLA's graduating class who wanted to matriculate into fouryear college were accepted with approximately \$1 million committed in scholarships
- 100% of students in RS-NOLA's graduating class who wanted to become Green Balloon Fellows were accepted
- RS-NOLA's charter was renewed for another five year term (charter expires June 2027)
- Successful launch and Year 1 for RS-INDY and its degree of operational autonomy from RSF (less than 10% of RSF team capacity is needed to support RS-INDY
- RS-INDY receiving an invitation from the Office of Education Innovation to amend its charter and serve 7th and 8th grade students beginning fall 2022
- RS-V is currently on track with meeting all pre-opening goals and occupies 25% of RSF team capacity
- Affirmation from over 100 Clark County community members over two years about the need for a school model like Rooted and its progress towards meeting pre-opening goals such as: identifying a Founding School Leader from Clark County, identifying a Year 1 facility partner that will also function as a source of enrollment, support from potential employer partners, and national resources to leverage where RS-CC has the biggest academic, financial, and organizational gaps.

(2) Describe the CMO/EMO's track record with regard to Academic Performance. Provide as Attachment 23 the three most recent academic performance reports from the state department of education and authorizer for all other schools affiliated with the EMO/CMO. Reports should provide all available data disaggregated by subgroup.

- The below information reflects the Academic Performance of RS-NOLA over the past four years. RS-INDY'S data is provided in Attachment 23 and captures progress over 2020-2021.
- RS-NOLA is on track to achieve an 89% graduation rate (NOLA's highest city-wide average is 78%)
- Eight out of ten graduates earned at least one tech Industry Based Credential (IBC). More than 60% of students who attend RS-NOLA over four years will earn at least four IBCs. 25% will go on to earn four or more.
- When our first cohort arrived at RS-NOLA, they were reading, on average, at a sixth grade Lexile level (865L. At the end of their third year, they were reading, on average, at an eleventh grade Lexile level (1156L). Before they were prepared to graduate high school, their cohort, on average, was on track to meet our college and career readiness target (>1050L).
- RS-NOLA has consistently performed above district averages in reading and math
- In Year 1, RS-NOLA received a School Performance Score of "B". In Year 2, the school received a School Performance Score of "C" and a School Growth Score of "B"for how successfully it grew its second cohort from where they started.
- 43% of RS-NOLA's college-bound students will be the first in their families to go to college
- 43% of RS-NOLA's students received more than \$1M in merit-based scholarships
- 20% of graduates were hired by New Orleans-based companies in STEM-related fields
- Attachment 23 includes the three most recent academic reports from the state department of education

(3) Describe the CMO/EMO's track record with regard to Financial Performance. Provide, as Attachment 24, a copy of the management organization's three most recent audits and other historical financial documents for the CMO/EMO.

- RS-NOLA and RS-INDY meet their authorizer's financial framework targets.
- RS-NOLA has had three years of clean financial audits without any material weaknesses.
- If current projects hold, RS-NOLA and RS-INDY will be sustainable on per pupil funding by the end of their fifth years
- Please see Attachment 24 for our most recent audits. Note that audits only exist for RS-NOLA since RS-INDY and RSF became operational within the 20-21 school year.

(4) Describe the CMO/EMO's track record with regard to Organizational Performance. Provide as Attachment 25 the three most recent organizational performance reports from the state department of education and authorizer for all other schools affiliated with the EMO/CMO.

• RS-NOLA and RS-INDY remain in good standing with the compliance requirements of New Orleans Public Schools (NOLA-PS) and Indianapolis' Mayor's Office of Education Innovation (OEI).

• All Rooted School regions have had independent audits resulting in *no findings*.

(5) Complete the Summary and Contact Information worksheet in the CMO/EMO Data Request template for each of the CMO's/EMO's schools.

• Please see Attachment 27

(6) Complete the CMO/EMO Achievement Data and Audit data worksheets and provide any explanatory or contextual information in the Info tabs of the CMO/EMO Data Request template for each **of the EMO's schools.**

• Please see Attachments 23 & 27

(7) Provide three years of audited financial statements for each of the schools identified which has been in operation for more than a year as Attachment 26.

- Please refer to Attachment 26 for audits of RS-NOLA
- Audits do not exists for RSF because the organization became operational within 2022

SCALE STRATEGY

This section applies to start-up applicants seeking to contract with a CMO/EMO and to experienced CMO applicants.

(1) Describe the steps that the CMO/EMO and local school team will take to scale the model to new sites, including the people involved and the resources contributed both by the CMO/EMO and the new schools.

There are currently no plans to scale the model to a new site after Nevada.

(2) Describe the school and the CMO's/EMO's current or planned process for recruiting and training potential school and/or network leaders. Explain how you have developed or plan to establish a pipeline of potential leaders. If known, identify candidates already in the pipeline for future positions.

When greenlighting a new region becomes likely, Rooted School Foundation will open an application and candidate search for the potential Founding School Leader. With exception to Rooted School– Vancouver, multiple candidates are typically identified before the founding Board Members of a new site and become contractors to support with community engagement and student recruitment. Once authorized, Rooted School Foundation facilitates an interview process that allows the founding Board of Directors to select and hire the Founding School Leader of the new region.

Once hired, the Founding School Leader completes Rooted School Foundation's Green Balloon Fellowship Modules. These are six modules that cover all aspects of executing the Rooted School model and are managed by RSF's Advisor, Kaitlin Karpinski.

(3) If your CMO/EMO operates or supports schools in other states, compare the CMO's/EMO's efforts to scale operations to Nevada to past scale efforts in other states.

Attempting to scale Rooted School in Nevada has followed a similar process as RSF has used in Indiana and Washington respectively. Key differences to the Nevada process are listed below:

- Shorter timeline between authorization and projected school launch
- Cultivating non-existing national funding streams to support existing CMO expansion

• Ability to leverage model results and proof from Rooted School's first graduating cohort

Pre-authorization, RSF team intends to leverage its learnings from scaling the Rooted model in order to efficiently and effectively launch Rooted School–Clark County in the fastest timeline it has ever opened a school.

Specific successes of the New Orleans, Indianapolis and Vancouver, Washington expansion efforts:

- Consistently meeting pre-opening conditions by deadlines (according to authorizers and local funders)
- Cohesive board and school leadership that has mostly remained intact. For example, Ma'at Lands, Rooted School–Indianapolis' Executive Director has been the executive director and school leader for four years. Rooted School–Indianapolis' board of directors has needed to replace one board member in three years. The Rooted School– Vancouver board of directors has retained board members from the authorization period and has added board members that address expertise gaps that existed on the board.
- The *Student Green Balloon Fellowship (SGBF)*, the country's first high-school-toemployment fellowship, providing a pathway for youth to high-growth, high-wage careers—right out of high school.

GBF selects high-potential students, matches them with year-long paid professional track positions at local tech companies and provides them with the hands-on training and coaching support they need to succeed.

This includes helping them earn any necessary industry-based credentials before their first day on the job. The *Student GBF* is being piloted with a number of recent Rooted NOLA graduates, who are earning an average of \$32,000 per year, a living wage that's higher than the average family income in many of the neighborhoods that they live in.

The program will soon expand to other non-Rooted students in NOLA and eventually to Rooted's other target cities.

• A *Youth Cash Transfer Pilot* (<u>https://www.4pt0.org/youth-cash-transfer-pilot</u>) provides Rooted students who are experiencing poverty with \$50 in cash each week.

Funded by early stage incubator **4.0**, this is the first such program to provide high school youth with the promising, anti-poverty tool of basic income. Researchers from the *Center for Guaranteed Income Research* at the University of Pennsylvania, who were the co-principal investigators of the first mayor-led guaranteed income pilot in Stockton, CA, are evaluating the impact of the cash transfers on students' lives. Their study results to be released in Q1 2022.

RSF is currently raising funds to sponsor a Randomized Control Trial of the cash transfer program, in partnership with the *Center for Guaranteed Income* and 200+ student participants at the New Orleans and Indianapolis campuses in the 2022-2023 school year.

Specific areas of improvement from the Indianapolis and Vancouver, Washington expansions:

- (From Indianapolis) Draft Service Agreement presented to the founding school leader before hired and presented to the board of directors during onboarding to establish clarity in the roles, responsibilities, and costs exchanged between Rooted School Foundation and the local Rooted School.
- (From Vancouver, Washington) Service Agreement and financial modeling that assumes planning year and Year 1 support from Rooted School Foundation and associated service fees accounted for and agreed upon by local board of directors.
- School startup uncertainty means that school planning must consider how one will adjust to different uncertainties and unexpected challenges. Very few things will happen between now and opening that could result in us unexpectedly having extra funding, but there are plenty of things that could result in greater expenses than we had initially planned [e.g. a more expensive facility, the need for additional SPED/ELL support for a student(s), School Employees Benefits Board (SEBB) premium increases, etc.].

Evidence of Success:

- (Indianapolis) Rooted School–Indianapolis was invited to revise its charter to include a 7th and 8th grade. Beginning fall 2022, the school will become a 7th–12th grade high school model.
- (Indianapolis) Rooted School–Indianapolis has a permanent facility through its partnership with Eastern Star Church's ROCK Initiative.
- (Vancouver, Washington) Rooted School–Vancouver is on track with meeting its preopening conditions and has secured its facility for the next 10 years.

(4) Describe plans for embedding the fundamental features of the model that you described in the transformational change section in each new school that you plan to open.

Rooted School Foundation will embed the mode's most fundamental features by supporting Rooted School–Clark County in the following ways:

- Contracting with the proposed Founding School Leader pre-authorization and training that leader in the "Rooted Way" through navigating the Green Balloon Fellowship Modules
- Establishing a Service Agreement that stipulates the conditions for using the Rooted School trademark
- Providing the services agreed upon annually to ensure the Rooted model is executed in accordance to its stated mission and vision in partnership with the Clark County community

(5) Provide, as Attachment 21, the following organization charts (including both network management and schools within the network):

- (a) Year 1 network as a whole
- (b) Year 3 network as a whole
- (c) Year 6 network as a whole

The organization charts should represent all national operations and clearly delineate the roles and responsibilities of – and lines of authority and reporting among – the governing board, staff, any related bodies (e.g., advisory bodies or parent/teacher councils), and any external organizations that will play a role in managing the schools. Clearly show the CMO's/EMO's role and the role of positions employed by the CMO/EMO in the organizational structure of the school, explaining how the relationship between the governing board and school administration will be managed.

Please see Attachment 21 for the organization charts.

*Please note the addition of the new *Rooted School Foundation Greenlighting Tool* on the following page. The tool was redesigned and completed after follow-up conversations with SPCSA. The tool is meant to show Rooted School Foundation's readiness to grow and expand to the Nevada region.

The tool was completed by school leaders, board members and senior RSF staff in our three current operating regions:

- New Orleans, La
- Indianapolis, In
- Vancouver, Wa

All entities were asked to submit candid, honest and forthright input into the completion of the document.

The response options were:

- Condition Fully Met
- Condition Partially Met
- Condition Not Met

Updated Expansion Greenlighting

Rooted School Foundation

Readiness to Grow	Criteria	Conditions	Current Rating	NOTES
Is Rooted School Foundation poised to successfully	Academic Results	Academic performance is in the	Condition Fully Met	

grow as a network of schools while maintaining strong performance at existing schools?	& Model Fidelity	top quartile in our current region(s) State testing is at or above the mean for the respective region(s)	Condition Fully Met	
		All schools are on track to meet all internal annual academic benchmarks for the school year	Condition Partially Met	
		No school has failed to meet 3+ internal annual academic benchmarks	Condition Fully Met	
		Students at all schools have earned (or are on track to earn) at least 4 industry-based credential (IBCs) prior to graduation	Condition Fully Met	
		Staff satisfaction rates are at or above 80%	Condition Fully Met	
	Organizational Health	Staff retention rates at or above 80%	Condition Fully Met	
		Parent satisfaction rates are at or above 80%	Condition Fully Met	

	Student satisfaction rates are at or above 80%	Condition Fully Met	
	Student retention rates are at or above 80%	Condition Fully Met	
	There is a strong plan in place to ensure high-quality leader candidates are receiving training at least one year before launch	Condition Fully Met	
	There is minimal principal turnover at existing school(s)	Condition Fully Met	
	Director level leaders are in place and budgeted for coming school year	Condition Partially Met	
	There is 60 days of available cash on hand	Condition Fully Met	
Financial Standing	All schools are on target to meet board- approved budgets	Condition Fully Met	
	Line-of-sight to estimated fundraising outcome exceeds annual goal(s)	Condition Partially Met	

		All annual school audits have been conducted in compliance with state regulations and show no unresolved findings	Condition Fully Met	
		Rooted School Receives Additional CSP Funding Support to bridge years 1 - 3 launch	Condition Fully Met	
Assessing The Opportunity	Criteria	Conditions	Current Rating	NOTES
		Can project a path to meet annual student enrollment for at least the first 5 years	Condition Fully Met	
Does the current opportunity for		A clear set of enrollment strategies are present to meet any deficit(s)	Condition Fully Met	
growth create the conditions for Rooted Schools to open a school successfully?	Enrollment	Estimated enrollment targets are unlikely to have a negative impact on the network and are projected to remain within deficit goals	Condition Partially Met	
		There is currently no significant enrollment risk that threatens economic sustainability	Condition Fully Met	

	The community has shown overall positive interest in joining Rooted School	Condition Fully Met	
	Community stakeholders have been enlisted in support of Rooted School	Condition Fully Met	
Communi Input, Support o Developmo	technology partners has made a	Condition Fully Met	Pending approval from SPCSA
	A cadre of network technology partners have executed MOUs to participate in the Green Balloon Fellowship (i.e. secured paid student internships)	Condition Partially Met	Pending approval from SPCSA
Facility Costs	Finance and operations consultants / staff are currently projecting <12% total facility cost	Condition Partially Met	This % will likely vary depending on state and regional facility costs.
& Concer	There is a clear facility plan set in place to ensure a smooth opening of schools	Condition Fully Met	

	A lease has currently been secured for all school locations	Condition Partially Met	Pending approval from SPCSA
	There is a strong likelihood that fundraising can turn financial risk green	Condition Fully Met	
	Funders indicate that they are currently willing to shoulder some of the risk	Condition Fully Met	
Fundraising Potential	Schools will not rely solely on philanthropic funding to make up budget gaps	Condition Fully Met	
	Additional revenue streams have been secured or are being fully investigated and vetted	Condition Fully Met	
Mission	Rooted School is seen as a high-quality school option in the surrounding community	Condition Fully Met	
Alignment & Focus	Students have easy access to schools with similar academic performance in the surrounding community	Condition Fully Met	This information excludes Clark County at this time.

Community leaders have expressed a need for a school like Rooted with a strong technology focused curriculum	Condition Fully Met	
Parents and students have expressed a need for a school like Rooted with a strong technology focused curriculum	Condition Fully Met	

SCHOOL MANAGEMENT CONTRACTS

This section applies to start-up applicants seeking to contract with a CMO/EMO and to experienced CMO applicants.

(1) If you are a committee to form (not a CMO applicant), describe the CMO/EMO selection process which was followed and how and why was this particular CMO/EMO was selected?

Not applicable.

(2) Describe the relationship between the school governing board and the CMO/EMO, specifying how the governing board will monitor and evaluate the performance of the service provider, the internal controls that will guide the relationship, and how the governing board will ensure fulfillment of performance expectations.

The RS–CC Board ultimately holds and manages the charter for the school and will enter a Service Agreement relationship with RSF. Annually, RS-CC and RSF will evaluate their relationship using the CMO Evaluation Tool below. Typically, RSF's leadership team is on call to meets with the Founding Board Chair and Founding School Leader of the new school at least 1-2 times per month to gauge progress against pre-opening goals and academic performance goals during the startup years of the initial charter term.

There have been significant changes to the CMO Evaluation Tool. The RSF Services Agreement has been amended as well to bring greater alignment between the two documents.

Please see ATTACHMENT 22

(3) Please describe what role, if any, the CMO/EMO has played and/or will play in the startup and incubation year for the school. Please also provide a draft of an agreement or MOU, as applicable.

Rooted School Foundation's leadership team has historically played a significant role in facilitating all aspects of the startup and incubation year for the new school. Support ranges from fundraising and board development to school leader coaching and curriculum development. A draft of the types of

services RSF may offer are included in the sample Services Agreement in Attachment 20.

If Rooted Clark County has to operate at a 45 student model, staffing would be adjusted to incorporate a hybrid teaching model. Rooted School Clark County would reduce facilities, transportation and other student count driven expenses by 50%. Below are some examples of adjustments Rooted School Clark County would make to the staffing plan:

90 students	45 students
English Teacher 1.0	Humanities Teacher 1.0
Social Studies Teacher 1.0	numanities reacher 1.0
Math Teacher 1.0	— STEM Teacher 1.0
Science Teacher 1.0	SIEM reacher 1.0
Special Education Teacher 1.0	CDED /ELL Tagahar 1.0
English Language Learner Teacher 1.0	SPED/ELL Teacher 1.0

The budget is dependent upon receipt of the Charter School Program (CSP) grant over the next four years for a total of \$1.5 million, but the school has not received the award for this cycle although we did receive the award in the previous cycle but had to defer. When asked about the possibility that the proposed school would not be awarded the CSP grant, the CMO and school board acknowledged that the budget would need to be re-examined.

As noted in the Operations Section, the incubation year plan indicates that the school leader, director of operations, and director of CTE are expected to work full or part time during the incubation year. However, the budget accounts for the school leader to be full time, the Director of School Operations to be part time, and does not include funding for the director of CTE during the incubation year. In addition to this discrepancy, the funding for these positions has not been secured. Without funding, it's not clear that the incubation plan can be successfully completed.

During the Incubation year, Rooted Clark County will hire a full-time School Leader and full-time Director of School Operations. The School Leader and Director of School Operations will be employed from January to June 2022. The Director of CTE will start in July 2022 with the rest of the founding team. CSP funds will cover the salaries for the School Leader and Director of Operations in the Incubation Year. Since the two roles will only be filled for ½ of the year, they are reflected on the budget as a .50 full time equivalent.

(4) Explain any shared or centralized support services the CMO/EMO or its affiliates will provide to schools in Nevada, which should align to the proposed management contract. Please include:

- (a) Any academic support resources should your school expect from the EMO or CMO
- (b) Any processes for collecting and reporting data across the network of CMO/EMO
 - schools in Nevada and in other jurisdictions.

Rooted School Foundation is revising its centralized support services and data reporting requirements in concert with Charter School Growth Fund's updated grant reporting requirements and will complete these updates by the capacity interview.

(5) Describe the structure, specific services to be provided by the CMO/EMO, the cost of those services, how costs will be allocated among schools, and specific service goals of the network. Please also include how the board will measure successful delivery of these services. The governing board

must outline the services to be provided by the CMO/EMO and/or its affiliates in the term sheet and draft contract provided later in Attachment 20. *Note that Nevada law allows charter schools to contract for the management or operation of the school with either a for-profit or non-profit entity.*

Function	Network/ Management Organization Decision-Making	Local Board Decision- Making	School Leader Decision-Making
Performance Goals	NO	YES	YES
Curriculum	NO	YES	YES
Professional Development	YES	YES	YES
Data Management and Interim Assessments	NO	NO	YES
Promotion Criteria	YES	YES	YES
Culture	YES	YES	YES
Budgeting, Finance, and Accounting	NO	YES	YES
Student Recruitment	YES	YES	YES
School Staff Recruitmentand Hiring	NO	NO	YES
HR Services (payroll,benefits, etc.)	NO	NO	YES
Facilities Management	NO	YES	YES
Vendor Management / Procurement	NO	YES	YES
Student Support Services	NO	NO	YES
Other operational services, if applicable	YES	NO	YES
Development/Fundraising	YES	NO	NO
Community Relations	NO	YES	YES
IT	NO	YES	YES

The structure and cost of RSF's supports are outlined in the Service Agreement provided in Attachment 20.

A more detailed list of services to go into the signed RSF – RS-CC agreement appears below:

- A. RSF will provide the services below to RS-CC under the RSF Services Agreement with the following 3 objectives:
 - a) RS-CC's Board successfully meets its 2022–2023 school year goals
 - b) RS-CC's School Leader/Executive Director successfully meets their 2022–2023 school year goals
 - c) RS-CC successfully adheres to the Rooted School model articulated in the charter contract
- B. Bi-weekly 30 minute check-in meeting with RS-CC Board Chair or designee
- C. Weekly 60 minute check-in with RS-CC Executive Director
- D. Attend monthly RS-CC Board meeting (virtually or in-person at RSF's option)
- E. Assist with Board meeting and agenda preparation and other aspects of Board meeting design, including posting Board meeting notice and meeting minutes
- F. Manage Board on Track or similar platform
- G. Strategize with RS-CC Board members regarding agenda items
- H. Plan and coordinate annual Board retreat and plan professional development/strategic planning opportunities offered at retreat including:

- a) Shared training with a third party vendor specializing in board governance and board development
- b) Board president training and consulting
- c) Regional board compliance training and professional development
- d) Professional development and training on applicable state public records and open meetings act requirements
- e) Professional development and training in Roberts Rules of Order as they pertain to public school meetings
- I. Provide ongoing fundraising assistance and grant writing services including:
 - 1. Charter School Growth Fund relationship management
 - 2. RSF will use best efforts to assist with securing lending partner(s) for facility, but does not guarantee fundraising efforts will be successful
 - 3. Grant consulting and RFP search services
 - 4. Grant writing assistance, which includes but is not restricted to ongoing engagement with Ruth Richerson Consulting

Costs and expenses for i) Services provided by outside fundraisers ii) Fundraising costs including but not limited to the costs of printing brochures, hosting events, and travel, are not included in RSF's Fee.

- J. Authorizer relationship management
 - i. Assist RS-CC with meeting compliance expectations of the authorizer. RS-CC is ultimately responsible for maintaining full compliance with its charter authorizer.
- K. Assist with recruiting and developing school leadership and faculty by:
 - a) Providing leadership training and professional development. RS-CC is ultimately responsible for training its staff to meet performance expectations set by the authorizer and school Board of Directors.
 - b) Providing instructional training and professional development RSNO is ultimately responsible for training its staff to meet performance expectations set by the authorizer and school Board of Directors.
 - c) Providing the opportunity for shared staff/faculty training with other regions at RSF-sponsored retreats.
 - d) Providing professional development on distance learning platforms and SIS platforms RS-CC is ultimately responsible for training its staff to meet performance expectations set by the authorizer and school Board of Directors.
 - e) Providing curriculum aligned to the *Universal Design for Learning, Project-Based Learning* and all state approved industry-based credentials (IBCs) RS-CC is ultimately responsible for creating and executing a curriculum that is aligned to the approved school charter submitted by Rooted School Foundation.
 - f) Coaching and consulting around local CTE requirements and credentialing RS-CC is ultimately responsible for creating and executing a curriculum that is aligned to the approved school charter submitted by Rooted School Foundation.
 - g) Coaching and consultation around fiscal planning and budget development. RS-CC is ultimately responsible for the budget it develops and approves.

- h) Coaching, consultation, and on the ground support to reach recruitment targets. RS-CC is ultimately responsible for meeting its enrollment goals.
- i) Identifying Industry Based Credentials that are in demand by high-growth/high-wage employers
- j) Managing the Industry Advisory Council (IAC)
- k) Industry partner relationship management
- L. Staffing search, hiring and H.R. consulting services:
 - a) Providing leadership training and professional development. RS-CC is ultimately responsible for training its staff to meet performance expectations set by the authorizer.
 - b) Providing instructional training and professional development RS-CC is ultimately responsible for training its staff to meet performance expectations set by the authorizer
 - c) Assist RS-CC in the development of Faculty/Staff Handbooks, Student Handbooks & Parent and Community Handbooks
- M. Facilities and physical plant consulting services:
 - a) Providing facility consulting and facility search services RS-CC is ultimately responsible for securing a safe and sustainable facility for the school.
 - b) Providing contracting, leasing consultation services. RSNO is ultimately responsible for securing a safe and sustainable facility for the school.

(6) Identify any school positions which will be employed by the CMO/EMO or may be employed by the CMO/EMO based on the contract. To the degree that this position will represent the interests of the school to other parties, including vendors, school employees, regulators, or the SPCSA, how will the board ensure there is appropriate oversight and management of that individual's activities by school employees or the board?

There are no school positions that will be employed by the CMO.

(7) Using the table below, summarize the roles and responsibilities of the EMO/CMO, local board, and school leader as they relate to key functions, including curriculum, professional development, culture, staffing, etc. This division of responsibilities will be evaluated both in the context of Nevada law and regulation and best organizational and authorizing practices nationally.

Function	EMO/CMO Role, Responsibilities and Decision-Making Authority	Local Board Decision- Making Role, Responsibilities and Decision- Making Authority	School Leader Decision-Making Role, Responsibilities and Decision- Making Authority
Performance Goals	The CMO will help to establish academic and culture goals / objectives on an annual basis	YES	YES

	Final authomity water with		
	Final authority rests with local board and school		
	leader		
	The CMO will help to		
	establish curriculum as		
	well as provide shared		
	curricula as needed or		
Curriculum		YES	YES
Curriculum	requested	I ES	IES
	Final authority rosts with		
	Final authority rests with local board and school		
	leader		
	Professional development		
	will be offered to the		
	school leader and the		
Professional Development	instructional team	YES	YES
	Final authority roots with		
	Final authority rests with local board and school		
	leader		
	The CMO will assist in		
	finding support but will		
Data Management and Interim		NO	YES
Assessments	not have any	NU	IES
	responsibility in these		
	areas Final authority rosts with		
	Final authority rests with local board and school		
	leader		
Promotion Criteria		YES	YES
	IBCs are model dependent	I LJ	113
	and will be a part of the		
	promotion criteria		
	YES The CMO will help to		
	establish academic and		
	culture goals / objectives		
	on an annual basis		
Culture		YES	YES
	Final authority rests with		
	local board and school		
	leader		
	The CMO will assist in		
	finding Ops support but		
Budgeting, Finance, and Accounting	will not have any	YES	YES
budgeting, i manee, and Accounting	responsibility in these	110	115
	areas		
	The CMO will assist in		
	providing strategies and		
Student Recruitment	support but will not have	YES	YES
	any final responsibility in	110	115
	these areas		
	The CMO will assist in		
School Staff Recruitment and Hiring	providing strategies and	NO	YES
sensor stan reer utilient and millig	support but will not have	110	115
	Support but will not have		

		1	
	any final responsibility in these areas		
	The CMO will assist in		
	finding support but will	NO	VDO
HR Services (payroll, benefits, etc.)	not have any	NO	YES
	responsibility in these		
	areas		
	This will be a major area		
Development/ Fundraising	of CMO support and	NO	NO
	delivery		
	The CMO will assist in		
	finding support but will		
Community Relations	not have any	YES	YES
	responsibility in these		
	areas		
IT	The CMO will not have any	YES	YES
11	responsibility in this area	1115	115
	The CMO will not have any		
	responsibility in this area		
	but will support in		
Facilities Management	securing plans for a	YES	YES
	location and helping to		
	develop a long-term		
	facility		
Vendor Management /	The CMO will not have any	YES	YES
Procurement	responsibility in this area	IES	I ES
	The CMO will not have any	NO	VEC
Student Support Services	responsibility in this area	NO	YES
	The CMO will support as		
Other operational services, if	needed based on Exhibit A	NO	YES
applicable	of the RSF Agreement	-	-

(8) Disclose fully and provide an explanation of any existing or potential conflicts of interest between the school governing board and proposed CMO/EMO or any affiliated business entities, including, without limitation, any past or current employment, business or familial relationship between any officer, employee, or agent of the proposed CMO/EMO and any prospective employee of the charter school, a member of the committee to form a charter school or the board of directors of the charter management organization, as applicable. Include a copy of the term(s) included or to be included in the contract, a staff handbook and other policy guidance which will clarify the board's policy for the school regarding the receipt by board or school staff of any free or largely discounted gifts, funds, jobs or personal services from the CMO/EMO at any time before, during or after a contract term with the CMO/EMO.

There are no existing or potential conflicts of interest between the school governing board and Rooted School Foundation.

Please note that Jonathan Johnson will not serve in any capacity on the governing board of RS-CC.

- (9) Please provide the following in Attachment 22:
 - (a) As an exhibit to the proposed management contract, a crosswalk of the academic, financial, and organizational goals of the charter school set forth in the SPCSA Charter School Performance Framework, including the school's mission-specific goals, and a clear identification of each of the performance goals and expectations for the education management organization related to each charter school goal. This will serve as the board's primary evaluative tool for the education management organization.

Please see item #2 above.

(b) Documentation of the service provider's for-profit or non-profit status and evidence that it is authorized to do business in Nevada.

We have filed the 1023 in January 2022 and are awaiting an update from the IRS on our tax-exempt status

CHARTER MANAGEMENT ORGANIZATIONS APPLYING FOR SPONSORSHIP DIRECTLY

This section applies only to experienced CMO applicants.

(1) If this application is being submitted by an existing Charter Management Organization, please respond to the following (or explain if not applicable):

(a) To what extent does the governance model of the charter management organization applicant require a waiver from the governance provisions of the charter school law pursuant to NRS 388A.243? If the charter management organization is from another state, how does the board of the charter management organization intend to balance fidelity to its mission with appropriate input and oversight from Nevada residents?

Rooted School Foundation does not manage the charter for Rooted School–Clark County. The Rooted School–Clark County board holds the charter and will be responsible for seeking appropriate input and oversight from Nevada residents.

(b) Will the existing non-profit board govern the new school, or has the CMO formed a new non-profit corporation governed by a separate board?

The existing non-profit board for Rooted School–Clark County will govern the new school.

(c) If the non-profit's current board will govern the charter school, what steps have been taken to transform its board membership, mission, and bylaws to assume its new duties? Describe the plan and timeline for completing the transition and orienting the board to its new duties.

Rooted School Foundation will support the Rooted School–Clark County board's transformation in preauthorization and, if approved, post-authorization using the following steps: Pre-authorization:

- Require Founding Board Members to read the submitted charter application
- Require participation at (2) capacity interview preparation meetings
- Require participation at (1) student recruitment event

Post-authorization:

- Participate in a RS-CC Board Retreat in January February 2022 facilitated by Education Board Partners (or an equivalent organization)
- Conduct monthly Board Meetings supported by Rooted School Foundation's leadership team and Education Board Partners (as needed)
- (d) If a new board has been formed, describe what, if anything, its ongoing relationship to the existing non-profit's board will be.

Not applicable

Attachment 1 Letters of Support



April 25, 2022

State Public Charter School Authority 2080 East Flamingo Road Suite 230 Las Vegas, Nevada 89119

Re: Support for Rooted School's Application to Operate a New Charter School

Dear Mr. Modrcin, SPCSA Staff, and SPCSA Board Members:

This letter represents our strong support for Rooted School's plans to open a charter high school in Las Vegas. We have met with members of the Rooted team over the past three years as they worked to learn more about our community and our needs, and we believe they offer something unique and immensely valuable to our community. Rooted's multiple information sessions for our students and families have generated significant buzz for this new high school option.

We lead a third grade through eighth grade school in the SPCSA portfolio, and a central part of our mission is preparing students for high school. Part of our work is to help families and scholars learn about their high school options and the different opportunities available at various high schools in our community. Our first class of founding scholars entered high school last fall, and through the high school exploration, application, and admissions process, we have learned much about what appeals to and inspires many of our families.

More than 33% of our families last year chose to enroll in one high school because of its corporate work study opportunities. Many others elected to apply to various magnet schools with training for in-demand career fields. Rooted's mission and vision speak to many of these same hopes and desires families have already voiced in the high school search process. Many of our families and scholars are intrigued by Rooted's views on prosperity, wealth, and opportunities that can include college *or* direct paths into lucrative career fields right after high school.

We are strongly aligned with Rooted's mission, so we are exploring possibilities to share space with Rooted until they secure a permanent facility. Pending final approval of a lease and space sharing agreement from the NV Prep board of directors and the SPCSA, we are open to potentially leasing office space and community meeting space prior to Rooted's school launch and then classroom space for Rooted's first school year. We are committed to helping Rooted reach an affordable facility solution with a lease rate that would not exceed recommended affordability guidelines (e.g., close to 15% of enrollment-based revenue).

Sincerely,

David Blodgett Executive Director

Makavla Hines

High School Access Counselor

Nevada Prep Charter School 1780 Betty Lane, Las Vegas, NV 89156 info@nvprep.org * 702-301-8118 6385 S. RAINBOW BLVD., SUITE 105 T: 702.967.3333 LAS VEGAS, NEVADA 89118 F: 702.314.1439 APPLIEDANALYSIS.COM



June 1, 2021

Ms. Rebecca Feiden, Director State Public Charter School Authority 1749 North Stewart Street, Suite 40 Carson City, Nevada 89706

Dear Director Feiden:

Please accept this letter as confirmation of my support for Rooted School's efforts to open a high school in Clark County with the mission of providing local underserved students the opportunity to achieve long-term, sustainable careers in technology.

Preparing our youth for careers in technology is more important than ever. Nevada employs more than 21,000 people in computer and mathematical occupations, an increase of 119 percent over the past decade. In 2020, over 15,000 of those jobs were located in Southern Nevada and that growth is showing no signs of slowing. Southern Nevada has become a home to tech firms such as Google, Switch, and AI-RGUS, with even more companies choosing to move or expand their Nevada workforce. UNLV and the City of Las Vegas are incubating new tech start-ups throughout the valley. Now is the time to equip Clark County students with the education necessary to take advantage of the expansion of tech industry opportunities.

Where does Rooted School fall in the picture? Rooted School Foundation is a nonprofit that builds schools for the purpose of providing underserved high school students the unique opportunity of receiving both a full-time job offer in tech and/or acceptance into a four-year college program. Partnering with local tech companies, students engage in industry-focused projects designed around specific community problems. As early as ninth grade, students in Rooted Schools not only have access to the education for a career in tech, but also the ability to work with industry partners at the equivalent of an entry-level hire. Rooted School's model would create a ripple effect in the Southern Nevada economy, generating a localized trained workforce, revenue and many benefits for the community at large.

I strongly encourage you to consider the application for Mr. Jonathan Johnson, Founder and CEO of Rooted School, and to give the Rooted team your support in providing the education and opportunities for students in communities where they are needed most. I am confident that Rooted School will have a positive impact on the education of the underserved students, while also benefitting the community overall.

Sincerely

Jeremy Aguero Principal

RESEARCH. ANALYSIS. SOLUTIONS. ECONOMIC ANALYSIS - FINANCIAL ANALYSIS/ADVISORY SERVICES - HOSPITALITY/GAMING CONSULTING - INFORMATION TECHNOLOGY/WEB-BASED SOLUTIONS LITIGATION SUPPORT/EXPERT ANALYSIS - MARKET ANALYSIS - OPINION POLLING/CONSUMER SENTIMENT ANALYSIS - PUBLIC POLICY ANALYSIS



May 26, 2021

Headquarters Office 2700 West Sahara Avenue Las Vegas, NV 89102 T 702·248·4200

Director Rebecca Feiden State Public Charter School Authority 1749 North Stewart Street, Suite 40 Carson City, NV 89706

Dear Director Feiden,

Please accept this letter as a confirmation of my support for Rooted School Foundation's efforts in opening a high school focused on giving Clark County students--especially our most underserved—a chance at closing the wealth gap in their lifetime through careers in technology.

Now more than ever, I believe our community needs more leaders and models of learning that define a realistic object-set that aligns with the real economic opportunities available on student's home turf. Debt from college is crushing many of our students –especially the most financially insecure—without providing the return on quality of life once promised. We simply need to offer more paths out of this cycle for families in Clark County.

I believe Mr. Jonathan Johnson, Founder and CEO of Rooted School Foundation, and the tech ecosystem that's beginning to rally behind them can be that example of proving a new possibility for Clark County Nevada, and beyond. Our community's young people are a talent source that's going vastly underutilized for our growing local economy. Rooted School Foundation's model is addressing an obvious local need and opportunity yet to be seized.

As a passionate supporter of education, especially for those students that are at a financial disadvantage, I am excited to support Rooted School Foundation in their mission to provide personal pathways to financial freedom for young people and families across Clark County, Nevada. Mr. Johnson and his team have demonstrated unprecedented results in New Orleans for a school their age and size, and I am confident Rooted School will have a positive impact on education in Clark County for years to come.

Respectfully, (M John Guedry **Chief Executive Officer** Bank of Nevada

JG/Im

A division of Western Alliance Bank. Member FDIC.

MICHAEL F. BOLOGNINI Vice President & Las Vegas Market Leader



COX COMMUNICATIONS, INC. 1700 Vegas Drive Las Vegas, NV 89106 702 / 545-1010 Michael.bolognini@cox.com

May 26, 2021

Director Rebecca Feiden State Public Charter School Authority 1749 North Stewart Street Suite 40 Carson City, Nevada 89706

Dear Rebecca,

Please accept this letter of support for Rooted School's efforts to open a Charter high school in Clark County Nevada focused on giving students, especially our most underserved, a chance at changing their life trajectory by closing the wealth gap through careers in technology. As the head of Cox Communications - Las Vegas, I can tell you that our business has continued to grow exponentially since we acquired Prime Cable over 20 years ago and as our business has grown so has our need for technology savvy candidates.

As Nevada continues to focus on diversifying our economy, we need to focus on graduating high school students with the technology skills needed by these new diverse business sectors. Not all technology positions require a candidate with a college degree and the associated debt that comes with a degree. We have an opportunity, with Mr. Johnson's Rooted School approach, to help address Southern Nevada's technology candidate shortfall while creating career opportunities for the most underrepresented Southern Nevada youth. By partnering with local companies on their technology talent needs, Rooted School is able to tailor their curriculum around specific skills and certifications which are in highest demand by the local business community and can produce immediate career opportunity for their graduates.

Mr. Johnson and the Rooted team have demonstrated unprecedented results in New Orleans for a school their age and size and I'm confident that Southern Nevada will benefit from the opening of a Rooted Charter School. Please feel free to contact me should you like to discuss my support of Mr. Johnson and his Rooted School approach.

Sincerely,

l'Bolgium

Michael F. Bolognini



What inspires you, inspires us. Let's talk. | www.eidebailly.com

9139 W. Russell Rd., Ste. 200 | Las Vegas, NV 89148-1250 | 702.304.0405 | F 702.304.0415 | EOE



Saturday, July 10, 2021

Director Rebecca Feiden State Public Charter School Authority 1749 North Stewart Street Suite 40 Carson City, Nevada 89706

Dear Director Feiden:

Please accept this letter in support of Rooted School, which is working to open a new charter school for underserved students in Las Vegas. As government affairs chair for the Vegas Chamber, the managing partner of Hightower Las Vegas and a member of the Governor's Workforce Development Board I can attest to the need our employers have for skilled labor. In fact, I would assert the need is urgent. Nevada is continuously disadvantaged by the perception we don't have the workforce necessary for company's looking to relocate in Nevada and existing employers being forced to look out of state for talent.

Rooted School will offer our most disadvantaged students the opportunity to obtain skills most in demand in our rapidly evolving economy through a technology focused program. Our community's efforts to diversify our economy will only be achieved when we are able to offer employers a student body with diversified skills. The skills Rooted School will offer will mean immediate employment for our students and a ready pipeline of candidates for our employers.

"Built it and they will come" is the famous line from the movie "Field of Dreams". We know that as the perception that Nevada is not ready for the 21st. century economy changes a new and diversified stream of employers will come. Rooted School is the catalyst for that change. I strongly encourage you to consider the Application for Charter from Mr. Jonathan Johnson, Founder and CEO of Rooted School, and to put forth all efforts toward supporting him in his worthwhile endeavor. It will greatly benefit our community. Thank you for the time, for all you do to support our region, and for your consideration of this matter.

Sincerely,

Hugh adera

Hugh Anderson, Managing Director, Partner

HighTower Las Vegas | 2360 Corporate Circle, Suite 160 | Henderson, NV 89074 | www.hightowerlasvegas.com Securities offered through HighTower Securities, LLC | Member FINRA/SIPC/MSRB | HighTower Advisors, LLC is a SEC registered investment adviser



May 27, 2021

Director Rebecca Feiden State Public Charter School Authority 1749 North Stewart Street Suite 40 Carson City, Nevada 89706

Dear Director Feiden:

Please accept this letter in support of Rooted School, which is working to open a new charter for underserved students in Southern Nevada. This is specifically a technology-focused program which is geared at creating an opportunity for the most underrepresented youth, while also meeting a critical need for local businesses.

Las Vegas Global Economic Alliance (LVGEA) is a public-private partnership dedicated to developing the economies of Las Vegas, Clark County, Henderson, North Las Vegas, Boulder City, and Mesquite through regional cooperation, global trade, and global connectivity. We are the economic and community development resource for Southern Nevada.

Rooted School's aim is to take the future talent already here and build it, thereby generating a pipeline of talent with generational benefits. Our young people are a talent source that is going vastly underutilized for our growing local economy. Rooted's model is addressing an obvious local need and opportunity.

I strongly encourage you to consider the Application for Charter from Mr. Jonathan Johnson, Founder and CEO of Rooted School, and to put forth all efforts toward supporting him in his worthwhile endeavor. I support their mission to provide personal pathways to financial freedom for young people and families in the Southern Nevada area.

Sincerely

Jonas Peterson President & CEO

+ 1 (702) 791-0000 lvgea.org | info@lvgea.org 6720 Via Austi Pkwy Ste 330 Las Vegas NV 89119

UNIV COLLEGE OF LIBERAL ARTS Department of Psychology

May 25, 2021

Director Rebecca Feiden State Public Charter School Authority 1749 North Stewart Street, Suite 40 Carson City, Nevada 89706

Dear Director Feiden,

Please accept this letter in support for Rooted School's efforts to open a high school focused on providing a technology-rich education for the most underrepresented youth in Southern Nevada. The intended program would prepare students for the STEM-oriented careers that would advance their prospects, as well as promote the workforce development that our region so desperately needs.

As former president of UNLV, I can directly attest to the disparities in STEM college-readiness for underrepresented groups. Any efforts we can make to bridge that unacceptable gap will change the family trees of these students, while serving the economic development of Southern Nevada. The data clearly supports the increased revenue potential of college graduates in STEM fields. These youth need us to facilitate their development and we need them to help grow and diversify our economy.

The Rooted School first opened in New Orleans in 2017 and has already shown impressive results. We have the talent in this valley – we just have to develop it in a laser-focused way. I believe the Rooted School's aims and outcomes strongly suggest that they would be a very appropriate way to start accomplishing this.

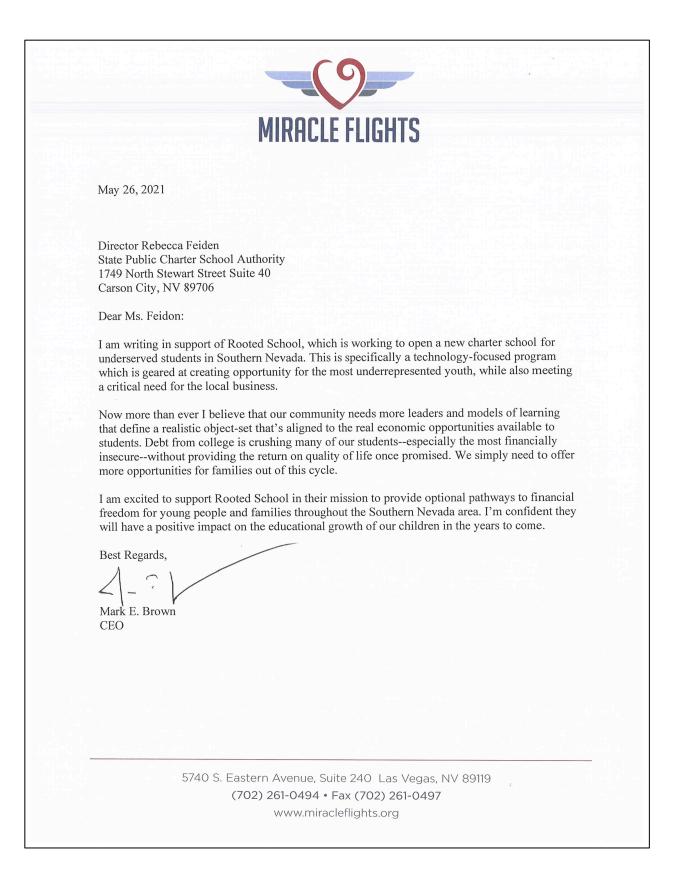
I thus enthusiastically lend my support to Mr. Johnathan Johnson's Application for Charter in his capacity as Founder and CEO of the Rooted School. This school would bene fit our community and have a significant impact. Thank you for your consideration of this important matter.

Sincerely,

m. Julano

Marta Meana, Ph.D. Professor of Psychology Former UNLV President (2018-2020)

Psychology Department College of Liberal Arts 4505 Maryland Parkway • Box 455030 Las Vegas, Nevada 89154-5030 Office (702) 895-3305 • Fax (702) 895-0195 http://psychology.univ.edu/



HUTCHISON & STEFFEN Attorneys

PECCOLE PROFESSIONAL PARK 10080 WEST ALTA DRIVE, SUITE 200 LAS VEGAS, NEVADA 89145 TEL 702.385.2500 FAX 702.385.2086

HUTCHLEGAL.COM

Mark A. Hutchison partner mhutchison@hutchlegal.com

May 25, 2021

Director Rebecca Feiden State Public Charter School Authority 1749 North Stewart Street, Suite 40 Carson City, NV 89706

Re: Rooted School

Dear Ms. Feiden:

Please accept this letter in support of Rooted School, which is working to open a new charter school for underserved students in Southern Nevada. This charter school will offer a technology-focused program, which is geared at creating opportunity for the most underrepresented youth, while also meeting a critical work-force need for local businesses.

As the Senior Partner of Hutchison & Steffen, PLLC, a law firm which has been in business for 25 years in Las Vegas, I can assure you that there is no better time than the present to put forth all efforts at increasing educational opportunities for minority students. Schools like Rooted provide a partnership with local technology companies to tailor their curricula around specific skills and certifications which are highest in demand and that can produce immediate opportunities to enter the work-force.

The business community in Southern Nevada has pursued increasing Southern Nevada's diversity of talent for years. These efforts often begin with attempts to bring new applicants to the region. Despite these efforts, the results have been disappointing, and the effort often overlooks a longer-term investment in developing opportunities for our local minority communities.

Rooted School's aim is to take the future talent already here and develop it, thereby generating a pipeline of talent with generational benefits. The Rooted School first opened in New Orleans in 2017 and has already shown impressive results. Southern Nevada has the opportunity to become a great chapter in the school's story.

I strongly encourage you to consider the Application for Charter from Mr. Jonathan Johnson, Founder and CEO of Rooted School, and to support him in his worthwhile endeavor. I'm confident that Rooted School will greatly benefit our community.

Building A Better World One Student At A Time.



Director Rebecca Feiden State Public Charter School Authority 1749 North Stewart Street, ste 40 Carson City, NV 89706

Dear Director Feiden,

Please accept this letter as my support for Rooted School, which is working to open a new charter school for underserved students in Nevada. In particular, they are focused on closing the wealth gap for these students by teaching some of the skills that are most important for our economy of tomorrow.

As CFO of National Technical Institute, I'm immersed in post-secondary education on a daily basis and see firsthand the importance of teaching skills needed for jobs. So many students in Clark County are capable of learning these skills, but many don't have the opportunity to focus their learning to help them find success.

Rooted School teaches these skills in a structured way in high school, allowing their graduates to move into a defined career path, or a determined focus of study in college. What a great way to further develop the talent pool our community so desperately needs!

I strongly encourage you to learn more about Rooted School, review the success they're having in other cities, and lend your support to this school as they look to educate so many wonderful and capable students in our community. I'm confident they will have a positive impact on our community and the lives of those who attend their school.

Thank you for the time and effort you put into helping education in our community to be the best it can be.

Sincerely,

Ryan Woodward CFO National Technical Institute

(702) 948-9000 • 1870 Whitney Mesa Drive Henderson, NV 89014 • www.**nti**training.com

NEVADA STATE BANK[®]

Terry A. Shirey President and Chief Executive Officer 750 E. Warm Springs Road, Suite 400 Las Vegas, Nevada 89119

May 26, 2021

Director Rebecca Feiden State Public Charter School Authority 1749 North Stewart Street Suite 40 Carson City, Nevada 89706

Dear Ms. Feiden:

Please accept this letter as a confirmation of my support for Rooted School's efforts in opening a high school focused on giving students -- especially our most underserved -- a chance at closing the wealth gap in their lifetime through careers in technology.

I can assure you that there is no better time than the present to put forth all efforts at increasing educational opportunities for minority students while developing a workforce that is desperately needed in our community. Schools like Rooted provide a partnership with local technology companies to tailor their curricula around specific skills and certifications which are of the highest need and that can produce immediate opportunities to enter the workforce.

I believe Mr. Johnson, Rooted School, and the tech ecosystem that's beginning to rally behind them can be that example of proving a new possibility for Clark County, NV and beyond. Our community's young people are a talent source that's going vastly underutilized for our growing local economy. Rooted's model is addressing an obvious local need and opportunity yet to be seized.

I am excited to support Rooted School in their mission to provide personal pathways to financial freedom for our youth. I strongly encourage you to consider the Application for Charter from Mr. Jonathan Johnson, Founder and CEO of Rooted School, and to put forth all efforts toward supporting him in his worthwhile endeavor. It will greatly benefit our community.

Sincerely,

Terry A. Shirey President and CEO Nevada State Bank

A division of Zions Bancorporation, N.A. Member FDIC

May 28, 2021

Rebecca Feiden, Executive Director State of Nevada/State Public Charter School Authority 2080 E Flamingo Rd., Suite 230 Las Vegas, NV 89119

Dear Rebecca,

Please accept this letter in support of Rooted School, which is working to open a new charter school for underserved students in Las Vegas, Nevada. This is specifically a technology-focused program which is geared at creating opportunity for the most underrepresented youth, while also meeting a critical need for local businesses.

As Senior Managing Directors of Newmark Knight Frank, a global real estate advisory firm which has been in business since 1929 in the US and since 2000 in Las Vegas, we can assure you that there is no better time than the present to put forth all efforts at increasing educational opportunities for minority students. Schools like Rooted provide a partnership with local companies to tailor their curricula around specific skills and certifications which are of the highest need and that can produce immediate opportunities to enter the workforce.

The entire business community in Las Vegas has pursued improving our local educational systems as well as increasing our diversity of talent for years. These efforts often begin with attempts to bring new applicants to the region. Despite all of these efforts, the results have been disappointing and often overlook a longer-term investment in developing opportunities for our local minority communities.

Rooted School's aim is to take the future talent *already here* and build it, thereby generating a pipeline of talent with *generational benefits*. The Rooted School first opened in New Orleans, LA in 2017 and has already shown impressive results. We have the opportunity to be another great chapter in their story.

I strongly encourage you to consider the Application for Charter from Mr. Jonathan Johnson, Founder and CEO of Rooted School, and to put forth all efforts toward supporting him in his worthwhile endeavor. It will greatly benefit our community. Thank you for the time, for all you do to support our region, and for your consideration of this matter.

Sincerely,

Cha Crad

Chris Crooks Senior Managing Director



Larry Singer Senior Managing Director

Chris Crooks Senior Managing Director 3930 Howard Hughes Pkwy. Suite 180 Las Vegas, NV 89169 ± 702-405-1726 mmrk.com

Larry Singer

Senior Managing Director 3930 Howard Hughes Pkwy. Suite 180 Las Vegas, NV 89169 t 702-405-1730 nmrk.com

NEWMARK

ROSEMAN UNIVERSITY

May 27, 2021

Director Rebecca Feiden State Public Charter School Authority 1749 North Stewart Street Suite 40 Carson City, Nevada 89706

Dear Ms. Feiden,

Please accept this letter in support of Rooted School. This charter school for underserved students of Southern Nevada would be a wonderful addition for our community. As a Health Science University, Roseman is clearly focused on STEM and bringing more opportunities for young people through pipeline programs. This is the type of school that could prepare our underrepresented youth for some great careers in healthcare.

I have been in healthcare for years and after opening and running two new hospitals in our town I can clearly say we struggle with filling the positions from within our communities. We rank 51% in the nation for nurse to population ratio. For medical doctors we are 47% in the nation for physician to population...should I go on? The healthcare arena is hurting. These careers can change lives and support our minority youth in changing the trajectory of their lives.

One of the points made by our regulatory bodies is that our medical doctors, nurses, and pharmacists are grossly underrepresented by the more diverse population. We believe that it is because they simply are not given the opportunity to be exposed to the sciences. Our Sr. Executive Dean for Diversity Equity and Inclusion spends most of her time building programs to help these young people get some exposure to the sciences and find out that these are areas that are worth pursuing, they can excel in and are fun!

Rooted School's aim is to take the future talent *already here* and build it, thereby generating a pipeline of talent for *generational benefits*. Southern Nevada has the chance to be another great success story in developing opportunities for our local minority communities. I strongly encourage you to consider the application for this charter school. We have the diverse population, let's give them the same ability to make something special of their lives through this amazing charter school.

10530 Discovery Drive | Las Vegas, NV 89135 | 702-802-2841 roseman.edu

Thank you for the time to give this thoughtful consideration and feel free to reach out to me.

Sincerely,

Victoria VanMeetren RN, HCÅ, MBA Special Advisor to the Dean and Business development for GENESIS Roseman University 10530 Discovery Drive Las Vegas, Nevada 89135

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UHS										
	Universal Health Services, Inc UHS of Delaware, Inc.	10105 Banburry Cross Drive Suite 230								
		Las Vegas Nevada 89144								
May 25, 2021		702-360-9040 FAX: 702-360-9047								
Director Rebecca Feiden State Public Charter School Authority 1749 North Stewart Street Suite 40 Carson City, Nevada 89706										
Dear Ms. Feiden:										
school focused on giving students-espe	Please accept this letter as a confirmation of my support for Rooted School's efforts in opening a high school focused on giving students-especially our most underserved-a chance at closing the wealth gap in their lifetime through careers in technology.									
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freedom for young people and families Rooted team have demonstrated unpre	I am excited to support Rooted School in their mission to provide personal pathways to financial freedom for young people and families across the southern Nevada metro area. Mr. Johnson and the Rooted team have demonstrated unprecedented results in New Orleans for a school their age and size and I'm confident will have a positive impact on the educational narrative of Las Vegas in the years to come.									
Sincerely, Auto Karla Perez, Vice President Acute Divisio Regional Vice President	on									



May 27, 2021

Director Rebecca Feiden State Public Charter School Authority 1749 North Stewart Street, Suite 40 Carson City, Nevada 89706

Dear Director Feiden:

I am writing this letter in support of the proposed Rooted School charter school in Las Vegas. Southern Nevada has one of the most diverse student populations in the country, where many students are underserved due to economics, language barriers, learning styles, and access to technology. To help lift them up and develop their full potential, they need access to a variety of education options, especially ones that combine curriculum with workforce skills.

Rooted School has successfully changed the lives of students in New Orleans, and it is an education model that we hope will be adopted in our community. Root School is founded on the principle that education that includes the relevant skills to obtain living wage jobs can lift people out of poverty and put them on the pathway to sustainable careers in technology.

Not only would the Rooted School approach to education benefit our underserved students by connecting them to a brighter future, but it will also help employers with workforce needs. In Southern Nevada, finding quality employees, particularly in STEM fields, is one of the top challenges facing businesses. Las Vegas has one of the lowest higher education attainment rates in the United States, which means not only are students unprepared for the workforce, but we as a community are leaving talented people behind simply because they did not get the education they need to thrive in our current economy.

Rooted School is focused on developing digital skills in the most in-demand industries. Additionally, the school has a commitment to connecting students with the next phase of their career development, whether college or a quality certificate program.

The school also understands that helping to lift people from poverty does not just involve the "how"; it is essential to always put the "why" front and center. Rooted School's approach gives students a sense of purpose and reminds them about the dignity and pathway to larger goals that their education will bring them.

On behalf of the Vegas Chamber, I urge you to approve the Rooted School charter to benefit students in Southern Nevada.

Sincerely,

Mary Beth Sewald

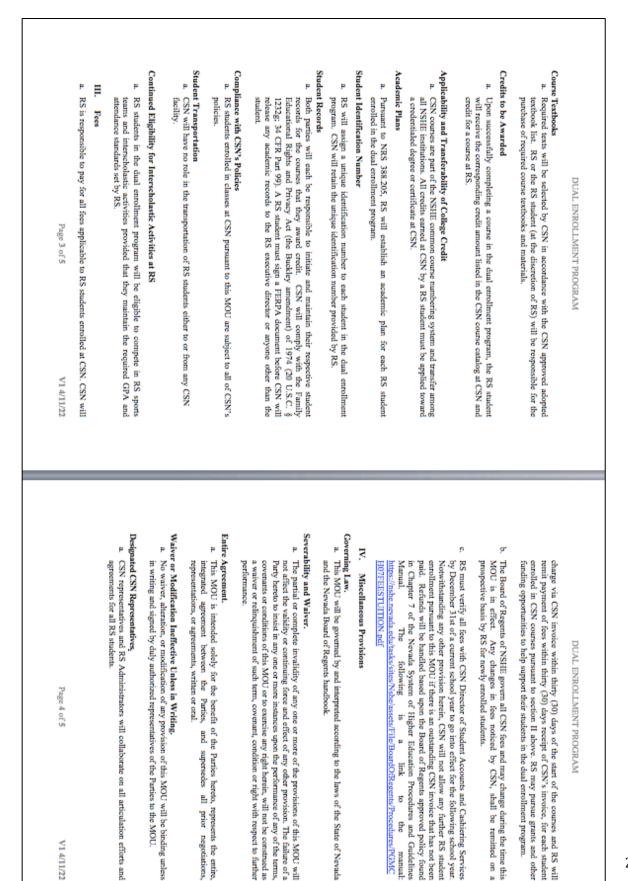
Mary Beth Sewald President & CEO

575 Symphony Park Ave., Ste. 100 Las Vegas, NV 89106 702.641.5822 • VegasChamber.com

Attachment 2 Dual Enrollment

Page 1 of 5	b. The term of the MOU shall be August 1, 2023, through July 31, 2028. By July 1, 2028, the Parties may agree through a written confirmation executed by their respective authorized representatives to extend the Term for five (5) additional years through July 31, 2033. Notwithstanding the foregoing, either party may terminate this MOU without cause upon thirty (30) days written notice to the other party, and any RS student will be able to complete the course(s) they are enrolled in pursuant to this MOU at the time of the written notice.		NOW, THEREFORE, the Parties agree as follows: I. Term and Purpose a. CSN through its Office of Academic Affairs will oversee the administration, instruction	graces 9, 10, 11, and 12 in a charter sensor in Nevada, and students formally enrolled in a Nevada school district sponsored program designed to meet the requirements of an adult standard diploma.	 High school students may enroll in an NSHE college or university, subject to the approval of appropriate institution officials. The term "high school student(s)" includes students enrolled in a Nevada public or private high school, students enrolled in 	WHEREAS, the Nevada System of Higher Education (NSHE) Handbook, Title 4, Chapter 16, Section 2 provides for, in relevant part: Dual and Early Enrollment for High School Students	collectively as the "parties." WHEREAS, RS is a Nevada charter high school offering unique secondary educational opportunities to its students; and WHEREAS, the Parties are willing to facilitate for selected RS students a limited opportunity for meditioner to history courses at CNN- and	This Memorandum of Understanding (MOU) is made and entered into by and between THE BOARD OF RECENTS OF THE NEVADA SYSTEM OF HIGHER EDUCATION, on behalf of THE COLLEGE OF SOUTHERN NEVADA And ROOTED SCHOOL The Rooted School (RS) and College of Southern Neveds (CSN) referred to individually as a "nerty" of	DUAL ENROLLMENT PROGRAM
V1 4/11/22	1, 2028, spective ugh July without t will be t time of	e formal	struction			ter 16,	ational ctunity	TION,	
		_		_		_			
Page 2 of 5	Selection of Courses a. While there is no restriction on the type of course that a RS student may enroll in, each RS student's course selection must be approved by RS in consultation with the student, CSN's academic advisor/success coach and must be consistent with the results of any placement tests or prerequisites established by CSN. Any consultation will include discussion about the advisability for a particular student to enroll in an "on-line class" in contrast to a class taught at one of CSN's campuses or centers.	Limitation on Number of Credit Hours Each Semester a. RS students enrolled pursuant to the terms of this MOU will be limited to a maximum of eighteen (18) credit hours each fall and spring semester at CSN. RS students may take up to nine credits during the summer term at CSN.	Class Schedule a. RS students will be required to attend the selected classes on the dates, days, and times that these classes are scheduled as per the official CSN academic calendar. No classes will be scheduled for RS students outside of the official CSN academic calendar.	Locations a. CSN will only offer academic courses and other coursework at established CSN campuses and CSN learning sites.	Academic Advisor/Success Coach/Counseling a. After completing the orientation and placement evaluations, each PA student must meet with a CSN academic advisor or success coach. RS students can receive counseling services to the same extent as regular CSN students.	Placement Evaluations a. Every PA student must prepare for and complete the Math and English placement assessments. Information regarding these placement assessments can be found at www.can.edu/testingcenter	New Student Orientation a. Each first-time RS student must participate in a mandatory in-person, three (3) hour Student Orientation. The orientation must be complete before scheduling an appointment with a CSN academic advisor or registering for classes.	II. Admission and Enrollment at CSN Pursuant to this MOU Student Selection & Admissions a. The selection of the RS high school students that will be able to enroll in CSN dual enrollment study courses pursuant to the terms of this MOU is exclusively reserved to RS and must be approved by CSN. Both parties will coordinate to verify that selected students quality for admission and enrollment pursuant to the terms of this MOU and applicable NSHE standards. Each first-time RS high school student must complete the CSN on-line admission form. The completeness and accuracy of the admissions form is the responsibility of the student.	DUAL ENROLLMENT PROGRAM
V1 4/11/22	at a RS student may enroll n consultation with the stu- tent with the results of any lation will include discussi- line class" in contrast to a	IOU will be limited to a n er at CSN. RS students ma	ss on the dates, days, and tim calendar. No classes will b lendar.	rsework at established CSN	aluations, each PA student must meet RS students can receive counseling	te the Math and English ment assessments can b	mandatory in-person, thre e complete before sch ering for classes.	nt at CSN Pursuant to this MOU school students that will be able to enroll in CSN dual ant to the terms of this MOU is exclusively reserved to RS SN. Both parties will coordinate to verify that selected on and enrollment pursuant to the terms of this MOU and Each first-time RS high school student must complete the Each first-time RS high accuracy of the admissions form is t.	GRAM

213



DUAL	ENROLLMENT PROGRAM	
Written Notices. a. Unless notified to the contra Parties at the addresses set bel	ary, all notices required by this MOU will be sent to low;	the
For College of Southern Nevada:	For Rooted School:	
Leticia Wells Director Early College	Johnathan Johnson Founder and CEO	
executed by their duly authorized repo have full authority to enter same, as the Board of Regents of the Nev	es have caused this Memorandum of Understanding to be resentatives and by so doing represent and warrant that the he day and date first above written. vada System of Higher Education on behalf of the llege of Southern Nevada	
Recommended by:		
Caprice Roberson, Associate Vice Pro	Dated: esident, Academic Affairs	
James McCoy, Vice President, Acade	emic Affairs	
: Mary Kave Bailey , VP Finance and /		lary
Mary, Kaye Bailey , VP Finance and /	Dated: M Administration	lary
: Mary Kaye Bailey , VP Finance and A Rooted School Approved by:	Dated: M Administration	lary
Maty Kaye Bailey , VP Finance and / Rooted School	Dated:M Administration Dated	lary

Attachment 3 School Calendar

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	Sun	Mon	Tues	Wed	Thurs	Fri	Sat	
				5		7	1	
D	2 9	3 10	4 11	5 12	6 13	7	8 15	Session 1: August 10 - September 4 4 wks/19 days 8/10, First Day of School for New Students
Aug	16	17	18	12	20	21	22	8/10, First Day of School for New Scudents 8/13, First Day of School for Returning Students
	23	24	25	26	27	28	29	or to, that buy of ballour for Readming balance
	27	31	1	2	3	4	5	9/4, PD day, no school for students
.	6	7	8	9	10	11	12	9/7 - 9/11 Session Break
Sept	13	14	15	16	17	18	19	Session 2: September 14 - November 20 10 wks/42 days
Ň	20 27	21	22 29	23	24	25	26 3	
	4	28 5	29 6	30 7	1	9	3 10	10/2, PD Day, no school for students
÷	11	12	13	14	15	16	17	10/8 - 10/14 Session Break
Oct	18	19	20	21	22	23	24	
	25	26	27	28	29	30	31	
	1	2	3	4	5	6	7	11/2, PD Day, no school for students
2	8	9	10	11	12	13	14	11/3, Election Day, no school for students
Νον	15 22	16 23	17 24	18 25	19 26	20 27	21 28	
	22	30	24	25	20	4	<u>20</u> 5	11/23 - 11/27 Session Break Session 3: November 30 - February 10 10 weeks/39 days
	6	7	8	9	10	11	12	Westing Trading W-Lengeli IV IV Receipto alia
Dec	13	14	15	16	17	18	19	
ŏ	20	21	22	23	24	25	26	12/21 – 1/I Session Break
	27	28	29	30	31	1	2	
	3	4	5	6	7	8	9	1/4 - 1/5, PD Days, no school for students
Jan	10	11	12	13	14	15	16	
ñ	17 24	18 25	19 26	20 27	21 28	22 29	23 30	1/18, Martin Luther King, Jr. Day
	31	1	2	3	4	5	6	2/5, PD Day, no school for students
	7	8	9	10	11	12	13	,,,
Feb	14	15	16	17	18	19	20	2/11-2/19 Mardi Gras Break
ШĔ.	21	22	23	24	25	26	27	Session 4: February 22 - May 28 14 weeks/63 days
	28	1	2	3	4	5	6	
March	7	8 15	9 16	10 17	11 18	12 19	13 20	
an	21	22	23	24	25	26	20	
\geq	28	29	30	31	1	. 2	3	4/2, PD Day, no school for students
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Aprll	11	12	13	14	15	16	17	
$\overline{\mathbf{A}}$	18	19	20	21	22	23	24	
	25 2	26	27 4	28 5	29 6	30 7	1 8	
-	9	10	11	12	13	14	15	
May	16	17	18	19	20	21	22	5/21, PD Day, no school for students
M	23	24	25	26	27	28	29	5/31 - 6/4 Session Break
	30	31	1	2	3	4	5	Session 5: June 7 - June 30 4 wks/16 days
•	6	7	8	9	10	11	12	6/18, Juneteenth
June	13	14	15	16	17	18	19	6/29, Last Day of School
٦	20 27	21 28	22 29	23	24	25 2	26 3	6/30, PD Day, no school for students <u>KEY Total days: 180</u>
	4	28	6	7	1 8	2 9	3 10	School in session, 8:20am to 4:20pm
Ņ	11	::12:::	13	: : : 14 : :	15	16 :	17	PD Day, No School for Students
July	18	19	20	21	22	23	24	No School for Students
	25	26	2/	28	29	30	31	Earty Dismissal: 1:00 PM

Attachment 4 Board Member Roster

	EXPERIENCE	EXPERIENCED APPLICANT BOARD MEMBER ROSTER	30AI	ND N	IEM	BER	RO	STE	~				1					
						ARE	AREA OF EXPERTISE	XPER	TISE				Ê.	ommi ange/e	TTEE	COMMITTEE ASSIGNMENT hange/expand as necessar	COMMITTEE ASSIGNMENT change/expand as necessary	3
CURRENT BOARD MEMBERS Name & Title on Board (if applicable)	OCCUPATION	LARGEST BUDGET MANAGED/ OVERSEEN (\$ or N/A)	eousuug/Buguncooy	2memord ever Organistic shared	state3 iso3/notherstano)	is go.1	Vgoloani 26T	PR/HR/Communications	Education	icolbe M	metanio V/ Ataunatero)	someinegel busel	in simple we d	oneral least	tramqolava0 baseB	eonand	Some manoe	Capitral Campaign
John Etzel	Executive Director, Boys Town Nevada	Unknown		X							Х	X						
Melissa Gruenhagen	Principal - Cristo Rey	Unknown		Х					Х		X	X						
Bilalia Mubashshir	Eprocurement Senior Software Consultant	Unknown	Х				X				X		an 1	LBD	LBD	LHD	LBD	1100
Merrick Murray	Title I Strategiest - Data	Unknown							X									
Greer Perkins	Educator/TFA School Leader Fellow	Unknown							х				Γ				L	L

Attachment 5 Board Member Information

To be completed individually by each proposed charter school board member and member of the Committee to Form (including prospective employees or consultants). All forms must be signed by hand.

Serving on a public charter school board is a position of public trust and fiduciary responsibility. As a board member of a public school, you are responsible for ensuring the quality of the school program, competent stewardship of public funds, and the school's fulfillment of its public obligations and all terms of its charter.

As part of the application for a new charter school, the SPCSA requests that each prospective board member respond individually to this questionnaire. Where narrative responses are required, brief responses are sufficient.

The purpose of this questionnaire is twofold: 1) to give application reviewers a clearer introduction to the applicant team behind each school proposal in advance of the applicant interview, in order to be better prepared for the interview; and 2) to encourage board members to reflect individually as well as collectively on their common mission, purposes, and obligations at the earliest stage of school development.

Background

- 1. Name of charter school on whose Board of Directors you intend to serve **Rooted School**
- 2. Full name

Home Address

Business Name and Address

Phone Number E-mail address

Bilalia H. Mubashshir



3. Brief educational and employment history and discussion of qualifications to serve on the board of this charter school.

My mother grew up in a single parent household in Compton; my father in the hard streets of South-Central Los Angeles. Although the gangs promised them a better life, my parents chose education instead. Both became amazing teachers that strived to give their children and their students the knowledge that life comes with options and education opens doors. A true child of my parents, I believe education can change lives. I stive to be a life-long learner, seeking to open my mind to new and different ideas thought my educational and employment journey.

In my undergrad I first attended Webster University in Missouri where I had the opportunity to study at Regents Business School in London, England for a semester. I earned my Bachelor of Arts degree with a concentration in Finance at California State University, San Bernardino. This is where I learned that economic immobility are large factors contributing to the increasing wealth gap.

Shortly after graduation, I joined the United States Peace Corps as an Economic Development Advisor in Butajia, Ethiopia. Here, I learned humility, flexibility and patience. While serving in Ethiopia, I wrote grant with the aid of a local counterpart to help a local group of entrepreneurs start small cattle fattening business. Our business plan and execution were then incorporated in the "best practices" workshops for incoming Peace Corps volunteers in that area.

Peace Corps taught me that I enjoyed being able to serve the community that I live in. I went to work for a non - profit, the Wilmer Amina Carter Foundation. It was there that I really began to seeing the intricacies of an organization. As program director, I developed skills in program management and found I had a knack for logistics and strive for efficiency and sustainability. In this role, I developed the "Bridges That Carried Us Over" programming direction. The Bridges project archived the stories and voices of local African Americans that were often left out of the community's historical narrative.

After moving to Northern California, I accepted a job as the Youth Services Coordinator art Konocti Unified School District. I was tasked with creating the first summer enrichment program for the district. One of my goals was to engage the community in the school events, which was achieved through my partnership with community groups and involvement with public service club. I became a Rotary Club Board Member, Lake County Symphony Association Board Member, and the Volunteer Coordinator for the North Coast Opportunities non-profit organization.

Public service became a passion of mine, and I went back to California State University, San Bernardino to earn my master's degree in Public Administration. Again, my interested in the financial aspects of our society, I begin studying public procurement and technology. Shortly before graduation I was hired by the leading eProcurement company in the Netherlands, Mercell USA, to open a West Coast branch office.

After moving to Las Vegas in February of 2021, I join the Teach for America Staff Team. My mission remains unchanged, I strive to create a positive impact on my community in my personal and professional life. My work and educational history demonstrates my commitment to diversity, equity, and economic mobility. The future of our nation is shaped in classrooms.

- 4. X Resume and professional bio are attached.
- 5. Indicate whether you currently or have previously served on a board of a school district, another charter school, a non-public school or any not-for-profit corporation (to the extent not otherwise indicated in your response to Item 3, above).
 - X Does not apply to me. 🗌 Yes
- 6. Why do you wish to serve on the board of the proposed charter school?

To serve the students and families in my community. I feel all students have the right to an equitable education. Traditional schools place a large focus on college readiness, and while this is an important focus, career-readiness, especially in the technology sector, should hold equal importance to college-bound students in the education sector.

7. What is your understanding of the appropriate role of a public charter school board member?

The board's job is to the set the direction of the school, aligning the overall mission to the school objectives.

8. Describe any previous experience you have that is relevant to serving on the charter school's board (e.g., other board service). If you have not had previous experience of this nature, explain why you have the capability to be an effective board member.

I have severed in a number of board positions, including Clearlake Rotary and the Lake County Symphony Association. In addition, I brough my financial expertise to the Wilmer Amina Carter Foundation Board Meetings as the Program Manager

9. Describe the specific knowledge and experience that you would bring to the board.

My knowledge of educational management, non-profit program management, public administration, and financial operation constitutes a unique set of skills that I will bring to the board.

School Mission and Program

1. What is your understanding of the school's mission and guiding beliefs?

Students should have the opportunity to gain financial freedom and economic mobility through college or career pathways, thus closing the wealth gap that exists in our country.

2. What is your understanding of the school's proposed educational program?

Student can choose a college or career pathway. Students will be taught tech relevant skills, graduating with top tech certifications.

- 3. What do you believe to be the characteristics of a successful school?
 - A clear mission and goals
 - A dedicated, passionate staff, faculty and administration
 - Compassionate leadership
 - High standards of excellence for students, staff, faculty, and administration
 - Deep understanding of the importance of equity and inclusion in educational excellence
- 4. How will you know that the school is succeeding (or not) in its mission?

A school the is succeeding will have the following characteristic:

- Leadership displays strong leadership skills. Student and staff respect school leadership and openly invite constructive conflict
- Students graduate with job offers or college offers at a high rate
- Clear goals and direction with high expectations that are consistently being meet
- Faculty, staff, and administration work together and welcome innovate solution to problems
- Safe and secure leaning environment

Governance

1. Describe the role that the board will play in the school's operation.

The board will be primarily responsible for mission alignment and ensuring compliance with state and federal education standards.

- 2. How will you know if the school is successful at the end of the first year of operation?
- The success of the school can be measured by enrollment numbers, teacher retention, testing scores, the number of students that graduate with a job offer and/or college offer.
- 3. How will you know at the end of three years if the school is successful?
- Enrollment rates are increasing. Parents are seeking to have multiple children in the program. Graduating students feel confident in their skills to pursue tech position, high achievements in test scores. Overall growth within in the school.
- 4. What specific steps do you think the charter school board will need to take to ensure that the school is successful?
 - Actively seek technology sector connections and partnerships
 - Support the school administration
 - Use data-driven methods for decision making
- 5. How would you handle a situation in which you believe one or more members of the school's board were acting unethically or not in the best interests of the school?

One-on-on conversation is the first point of conflict resolution. As such I would speak to the other board member about my perception of their actions. I would also bring up my concerns with the res t of the board members or proper authorities.

Disclosures

1. Indicate whether you or your spouse or any relative within the third degree of consanguinity or affinity knows the other prospective board members for the proposed school. If so, please indicate the precise nature of your relationship.

I / we do not know any such trustees. 🗌 Yes

- Indicate whether you or your spouse or any relative within the third degree of consanguinity or affinity knows any person who is proposed to be or you anticipate will apply to be a school employee. If so, indicate the precise nature of your relationship.
 I / we do not know any such employees. Yes
- 3. Indicate whether you or your spouse or any relative within the third degree of consanguinity or affinity knows anyone who is doing, or plans to do, business with the charter school (whether as an individual or as a director, officer, employee or agent of an entity). If so, indicate and describe the precise nature of your relationship and the nature of the business that such person or entity is transacting or will be transacting with the school.

🕅 I / we do not know any such persons. 🔲 Yes

4. Indicate if you, your spouse or any relative within the third degree of consanguinity or affinity anticipate conducting, or are conducting, any business with the school. If so, indicate the precise nature of the business that is being or will be conducted.

I / we do not anticipate conducting any such business. 🗌 Yes

5. If the school intends to contract with an education management organization or other education service provider, indicate whether you or your spouse or any relative within the third degree of consanguinity or affinity knows any employees, officers, owners, directors or agents of that provider. If the answer is in the affirmative, please describe any such relationship.

Not applicable because the school does not intend to contact with an education service provider or school management organization.

🔀 I / we do not know any such persons. 🗌 Yes

6. If the school contracts with an education management organization or education service provider, please indicate whether you, your spouse or any relative within the third degree of consanguinity or affinity have a direct or indirect ownership, employment, contractual or management interest in the provider. For any interest indicated, provide a detailed description.

X N/A. I / we have no such interest. Yes

- 8. Indicate whether you, your spouse or any relative within the third degree of consanguinity or affinity are a director, officer, employee, partner or member of, or are otherwise associated with, any organization that is partnering with the charter school. To the extent you have provided this information in response to prior items, you may so indicate.
 Does not apply to me, my spouse or family. Yes
- 10. Indicate any potential ethical or legal conflicts of interests that would, or are likely to, exist should you serve on the school's board.
 None. Yes

Certification

I, <u>Biblia H. Mubnshshr</u>, certify to the best of my knowledge and ability that the information I am providing to the State Public Charter School Authority as a prospective board member for <u>Robled School</u> Charter School is true and correct in every respect.

July 24, 2021 Date

Statement of Assurances

Revised June, 2015

1. The charter school herein named, <u>Rooted School</u>

(name of charter school)

shall be organized and administered in accordance and compliance with all applicable provisions of Nevada Revised Statutes (NRS), Nevada Administrative Code (NAC), and all applicable federal statutes and regulations.

2. The charter school shall enter into a written agreement with the sponsor and comply with all provisions therein during the term of the agreement upon approval by the sponsor.

3. The charter school shall report any and all substantive changes in personnel, facilities, schedules, and other pertinent components of the operation of the charter school to the sponsor in a timely manner.

4. The charter school shall keep such records and provide such information in the time and manner prescribed in NRS and NAC that the sponsor, the school district in which the charter school is located, the Nevada Department of Education, the State Board of Education, and the State Public Charter School Authority require, as needed for the purpose of fiscal audit, and program evaluation and reporting, including, but not limited to, the following. The charter school shall:

- Account for the total number of students, per NRS 387.123 and NRS 387.1233;
- Submit accountability and progress reports throughout the academic year;
- Conduct and report on required examinations of students;
- Submit required reports on class size averages and types of teacher assignments, including students in programs of special education;
- Submit separate accounting for funds received for pupils with disabilities and gifted and talented pupils, per NRS 387.047 and 388.520;
- Submit required accounts of funds from federal sources, per federal reporting and audit requirements;
- Submit reports regarding student truancy, transiency, attendance and dropout rates;
- Submit reports of weapons and violence incidence;
- Describe suspensions and expulsions; and
- Comply with state, district, and federal statutes and regulations regarding instruction of disabled students including the development and implementation of Individual Education Plans (IEPs) for disabled students.

5. Permission is hereby granted to any member of the State Public Charter School Authority, Nevada Department of Education, the Nevada Department of Taxation, the Legislative Counsel Bureau, and the local school district to visit the school and inspect the premises and operating procedures of the school during business hours.

6. The charter school and its Governing Body shall comply with the provisions of NRS Chapter 281, Public Officers and Employees, General Provisions.

Notarized Statement

I, the undersigned, do consent and do solemnly swear (or affirm) that the information set forth in the forgoing application is true and complete to the best of my knowledge, and that failure to disclose pertinent information or the concealment of information or making false statements in the detailed application for operation of a charter school shall constitute valid grounds for refusal or revocation of permission to operate said school. The undersigned also affirms that the charter school herein named is obligated to enter into an agreement concerning the methods and procedures for the sponsor to monitor the progress of the charter school herein named. The undersigned affirms that the State Public Charter School Authority, Nevada Department of Education and the sponsor are entitled to access to financial and other records relating to the operation of the charter school.



Signature of Certifying Charter School Official

Bilalia H. Mubashshir

Name Printed

Board Member STAFE OF NEVADA

COUNTY OF CLARK Subscribed and sworn to before me

July 24, 2021



Statement of Assurances

Revised June, 2015

(name of charter school) Rooted 1. The charter school herein named,

shall be organized and administered in accordance and compliance with all applicable provisions of Nevada Revised Statutes (NRS), Nevada Administrative Code (NAC), and all applicable federal statutes and regulations.

2. The charter school shall enter into a written agreement with the sponsor and comply with all provisions therein during the term of the agreement upon approval by the sponsor.

3. The charter school shall report any and all substantive changes in personnel, facilities, schedules, and other pertinent components of the operation of the charter school to the sponsor in a timely manner.

4. The charter school shall keep such records and provide such information in the time and manner prescribed in NRS and NAC that the sponsor, the school district in which the charter school is located, the Nevada Department of Education, the State Board of Education, and the State Public Charter School Authority require, as needed for the purpose of fiscal audit, and program evaluation and reporting, including, but not limited to, the following. The charter school shall:

- Account for the total number of students, per NRS 387.123 and NRS 387.1233;
- Submit accountability and progress reports throughout the academic year;
- Conduct and report on required examinations of students;
- Submit required reports on class size averages and types of teacher assignments, including students in programs of special education;
- Submit separate accounting for funds received for pupils with disabilities and gifted and talented pupils, per NRS 387.047 and 388.520;
- Submit required accounts of funds from federal sources, per federal reporting and audit requirements;
- Submit reports regarding student truancy, transiency, attendance and dropout rates;
- Submit reports of weapons and violence incidence;
- Describe suspensions and expulsions; and
- Comply with state, district, and federal statutes and regulations regarding instruction of disabled students including the development and implementation of Individual Education Plans (IEPs) for disabled students.

5. Permission is hereby granted to any member of the State Public Charter School Authority, Nevada Department of Education, the Nevada Department of Taxation, the Legislative Counsel Bureau, and the local school district to visit the school and inspect the premises and operating procedures of the school during business hours.

6. The charter school and its Governing Body shall comply with the provisions of NRS Chapter 281, Public Officers and Employees, General Provisions.

Notarized Statement

I, the undersigned, do consent and do solemnly swear (or affirm) that the information set forth in the forgoing application is true and complete to the best of my knowledge, and that failure to disclose pertinent information or the concealment of information or making false statements in the detailed application for operation of a charter school shall constitute valid grounds for refusal or revocation of permission to operate said school. The undersigned also affirms that the charter school herein named is obligated to enter into an agreement concerning the methods and procedures for the sponsor to monitor the progress of the charter school herein named. The undersigned affirms that the State Public Charter School Authority, Nevada Department of Education and the sponsor are entitled to access to financial and other records relating to the operation of the charter school.

Signature of Certifying Charter School Official

Greer A. Prigns

Name Printed

Board Member

Title

7 22 2021

Date

Subscribed and sworn to before me

mik (m 22ND day of JULY 2021 This 10

To be completed individually by each proposed charter school board member and member of the Committee to Form (including prospective employees or consultants). All forms must be signed by hand.

Serving on a public charter school board is a position of public trust and fiduciary responsibility. As a board member of a public school, you are responsible for ensuring the quality of the school program, competent stewardship of public funds, and the school's fulfillment of its public obligations and all terms of its charter.

As part of the application for a new charter school, the SPCSA requests that each prospective board member respond individually to this questionnaire. Where narrative responses are required, brief responses are sufficient.

The purpose of this questionnaire is twofold: 1) to give application reviewers a clearer introduction to the applicant team behind each school proposal in advance of the applicant interview, in order to be better prepared for the interview; and 2) to encourage board members to reflect individually as well as collectively on their common mission, purposes, and obligations at the earliest stage of school development.

Background

1. Name of charter school on whose Board of Directors you intend to serve

Rooted Schook Clark County

2. Full name

Greer Perkins

Business Name and Address

Phone Number E-mail address

Home Address

- 3. Brief educational and employment history and discussion of qualifications to serve on the board of this charter school.
- 4.

□ Resume and professional bio are attached.

- 5. Indicate whether you currently or have previously served on a board of a school district, another charter school, a non-public school or any not-for-profit corporation (to the extent not otherwise indicated in your response to Item 3, above). Does not apply to me. \Box Yes
- 6. Why do you wish to serve on the board of the proposed charter school?
 - a. I wish to serve on the board of Rooted Schools- Clark County to ensure that the mission and promise of the schools is felt by the high school students in Clark County. The hybrid instructional model in addition to the dedication and focus on

instilling lifelong talent skills in high school students will serve the students in Clark County and the community in a fundamental way.

- 7. What is your understanding of the appropriate role of a public charter school board member?
 - a. It is my understanding that a board member of a public charter school is responsible for working with the leadership and founding team of the school to ensure its success by dedicating at least one hour once a month towards the goal of getting the school's charter approved. I also commit to fully support the mission of Rooted Schools to promote the school's core values.
- 8. Describe any previous experience you have that is relevant to serving on the charter school's board (e.g., other board service). If you have not had previous experience of this nature, explain why you have the capability to be an effective board member.
 - a. I do have experience being on multiple school committee founding boards as well as being on several school advisory committees.
- 9. Describe the specific knowledge and experience that you would bring to the board.
 - a. I would bring the specific knowledge and experience in Clark County with the talent skills gaps that need to be filled in Clark County.

School Mission and Program

- 1. What is your understanding of the school's mission and guiding beliefs?
 - a. I understand that the ultimate goal of the schools mission is to provide students an independent pathway to financial freedom and stability by providing them with educational and experiential opportunities to take the steps towards that stability.
- 2. What is your understanding of the school's proposed educational program?
 - a. I understand that the school has a hybrid educational model that combines project based learning, self-directed learning and small group instruction.
- 3. What do you believe to be the characteristics of a successful school?
 - a. A successful charter school should be invested in the community, bound by the success of the students, data driven as well as values driven.
- 4. How will you know that the school is succeeding (or not) in its mission?
 - a. The success of Rooted Schools-Clark County can be quantified by the number of students who gain access to the digital (and other) sectors after gradation with the experience to relieve competitive high paying salaries which they will use to maintain financial freedom.

Governance

1. Describe the role that the board will play in the school's operation.

- a. The board will be responsible for collectively contributing their talents and resources towards the successful approval of the schools charter and then the successful opening and operation of the school.
- 2. How will you know if the school is successful at the end of the first year of operation?
 - a. With this being a highschool the main success criteria will be in the number of students who have met their four year goal of post secondary acceptance and a job offer. Year to year, success will be measured in retention numbers matching enrollment numbers, successful completion of their academic goals.
- 3. How will you know at the end of three years of the school is successful?
 - a. At the end of three years, the incoming class should be in a prime position to begin their preparations for post secondary applications as well as interning and preparing to inquire about full time positions after graduation.
- 4. What specific steps do you think the charter school board will need to take to ensure that the school is successful?
 - a. The charter school board will have to help recruit partners in the tech (or any any sector) who are also invested in the schools mission and interested in a steady stream of talent. It will also have to assist with recruitment of students and highly qualified and invested staff. The board may also be tasked with reaching out to potential donors and community investors.
- 5. How would you handle a situation in which you believe one or more members of the school's board were acting unethically or not in the best interests of the school?
 - a. I would first attempt to address my concerns with that board member directly and see if that elicits some change. If that doesn't bring about change I would go to the founder and address my concerns about the behaviors and actions of the other board member with them.

Disclosures

1. Indicate whether you or your spouse or any relative within the third degree of consanguinity or affinity knows the other prospective board members for the proposed school. If so, please indicate the precise nature of your relationship.

 \mathbf{M} I / we do not know any such trustees. \Box Yes

- 2. Indicate whether you or your spouse or any relative within the third degree of consanguinity or affinity knows any person who is proposed to be or you anticipate will apply to be a school employee. If so, indicate the precise nature of your relationship.
 I / we do not know any such employees.
- 3. Indicate whether you or your spouse or any relative within the third degree of consanguinity or affinity knows anyone who is doing, or plans to do, business with the charter school (whether as an individual or as a director, officer, employee or agent of an entity). If so, indicate and describe the precise nature of your relationship and the nature of the business that such person or entity is transacting or will be transacting with the school.

☑ I / we do not know any such persons. □ Yes

4. Indicate if you, your spouse or any relative within the third degree of consanguinity or affinity anticipate conducting, or are conducting, any business with the school. If so, indicate the precise nature of the business that is being or will be conducted.

 \blacksquare I / we do not anticipate conducting any such business. \Box Yes

5. If the school intends to contract with an education management organization or other education service provider, indicate whether you or your spouse or any relative within the third degree of consanguinity or affinity knows any employees, officers, owners, directors or agents of that provider. If the answer is in the affirmative, please describe any such relationship.
Not applicable because the school does not intend to contact with an education service provider or school management organization.

 \square I / we do not know any such persons. \square Yes

- 6. If the school contracts with an education management organization or education service provider, please indicate whether you, your spouse or any relative within the third degree of consanguinity or affinity have a direct or indirect ownership, employment, contractual or management interest in the provider. For any interest indicated, provide a detailed description. ☑ N/A. □ I / we have no such interest. □ Yes
- 7. If the school plans to contract with an education management organization or education service provider, indicate if you, your spouse or any relative within the third degree of consanguinity or affinity anticipate conducting, or are conducting, any business with the provider. If so, indicate the precise nature of the business that is being or will be conducted.
 Q/N/A. □ I / we or my family do not anticipate conducting any such business. □ Yes
- 8. Indicate whether you, your spouse or any relative within the third degree of consanguinity or affinity are a director, officer, employee, partner or member of, or are otherwise associated with,

any organization that is partnering with the charter school. To the extent you have provided this information in response to prior items, you may so indicate.
☑ Does not apply to me, my spouse or family. □ Yes

10. Indicate any potential ethical or legal conflicts of interests that would, or are likely to, exist should you serve on the school's board.

🗹 None. 🗆 Yes

Certification

I, _____Greer A. Perkins______, certify to the best of my knowledge and ability that the information I am providing to the State Public Charter School Authority as a prospective board member for _____Rooter Schools- Clark County___Charter School is true and correct in every respect.

7/18/21 Date

To be completed individually by each proposed charter school board member and member of the Committee to Form (including prospective employees or consultants). All forms must be signed by hand.

Serving on a public charter school board is a position of public trust and fiduciary responsibility. As a board member of a public school, you are responsible for ensuring the quality of the school program, competent stewardship of public funds, and the school's fulfillment of its public obligations and all terms of its charter.

As part of the application for a new charter school, the SPCSA requests that each prospective board member respond individually to this questionnaire. Where narrative responses are required, brief responses are sufficient.

The purpose of this questionnaire is twofold: 1) to give application reviewers a clearer introduction to the applicant team behind each school proposal in advance of the applicant interview, in order to be better prepared for the interview; and 2) to encourage board members to reflect individually as well as collectively on their common mission, purposes, and obligations at the earliest stage of school development.

Background

1. Name of charter school on whose Board of Directors you intend to serve

Rooted School Clark County

2. Full name

Home Address

Business Name and Address

Phone Number E-mail address

- John Peter Etzell
- 3. Brief educational and employment history and discussion of qualifications to serve on the board of this charter school. Bachelors in Social Work, completed in 2000 from University of St. Thomas, MN. 2012-2019, worked for Colorado Early College network of Charter Schools. 2 years as a Dean of Student Accountability and 5 years as a Principal. In those 5 years, I opened 2 new charter high schools in Colorado. 2019-Present, Executive Director of Boys Town Nevada.

4.

Resume and professional bio are attached.

- 5. Indicate whether you currently or have previously served on a board of a school district, another charter school, a non-public school or any not-for-profit corporation (to the extent not otherwise indicated in your response to Item 3, above).
 X Does not apply to me. Yes
- 6. Why do you wish to serve on the board of the proposed charter school? I am a firm believer in

high quality charter schools and the benefit they provide to students, families and the communities in which they reside. I didn't know much about charters until I started working for one in 2012 and quickly realized their value. I learned many lessons as a charter school leader and want to share my knowledge and passion for kids with other like minded leaders!

- 7. What is your understanding of the appropriate role of a public charter school board member? I think the role of a charter school board member is to use their knowledge to provide guidance to the school so they can achieve their mission, vision and values.
- 8. Describe any previous experience you have that is relevant to serving on the charter school's board (e.g., other board service). If you have not had previous experience of this nature, explain why you have the capability to be an effective board member. I do not have any experience being on a charter school board, only reporting to one.
- 9. Describe the specific knowledge and experience that you would bring to the board. Having been a charter school leader and founder before, I bring practical, operational, leadership, and governance experience to the board.

School Mission and Program

- 1. What is your understanding of the school's mission and guiding beliefs? It is my understanding that the school is focused on preparing students to be successful no matter their choice to enter the job market or continue in school after graduating high school. To give students financial options and educate them to make good decisions.
- 2. What is your understanding of the school's proposed educational program? A strong PBL based system that incorporates community wide partnerships that provide internships and other works based opportunities.
- 3. What do you believe to be the characteristics of a successful school? A strong educational model, and high expectations supported by thoughtful leaders who put kids first. Personal relationships are a key component to any new charter school.
- 4. How will you know that the school is succeeding (or not) in its mission? The return rate of students coming back each year is one metric. The school's ability to execute their mission and vision while developing strong community ties is another.

Governance

- 1. Describe the role that the board will play in the school's operation. The Board should listen to the expectations, bylaws and follow those. Some Boards are not operational, and only governance.
- 2. How will you know if the school is successful at the end of the first year of operation? We will know if the school is on the right path with the number of students who return for year 2, staff turnover rate and overall adherence to the guiding principles.
- 3. How will you know at the end of three years of the school is successful? Have we created a

demand for what this school offers? Have we provided value to the community, both the students and the local businesses who we are partnered with? The school should be growing in accordance with expectations and meeting academic and financial benchmarks.

- What specific steps do you think the charter school board will need to take to ensure that the 4. school is successful? The Board should first have a common understanding of expectations and then set goals to achieve those,
- How would you handle a situation in which you believe one or more members of the school's 5. board were acting unethically or not in the best interests of the school? There should be conflict management expectations written into the bylaws, in regards to Board member behavior. I would first go to those and follow what the expectations are.

Disclosures

- 1. Indicate whether you or your spouse or any relative within the third degree of consanguinity or affinity knows the other prospective board members for the proposed school. If so, please indicate the precise nature of your relationship.
 - I / we do not know any such trustees. 🗌 Yes
- 2. Indicate whether you or your spouse or any relative within the third degree of consanguinity or affinity knows any person who is proposed to be or you anticipate will apply to be a school employee. If so, indicate the precise nature of your relationship. \square I / we do not know any such employees. \square Yes
- 3. Indicate whether you or your spouse or any relative within the third degree of consanguinity or affinity knows anyone who is doing, or plans to do, business with the charter school (whether as an individual or as a director, officer, employee or agent of an entity). If so, indicate and describe the precise nature of your relationship and the nature of the business that such person or entity is transacting or will be transacting with the school.

Х	1	' we do	not l	know	any	such	persons,		Yes
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4. Indicate if you, your spouse or any relative within the third degree of consanguinity or affinity anticipate conducting, or are conducting, any business with the school. If so, indicate the precise nature of the business that is being or will be conducted.

I / we do not anticipate conducting any such business. 🗌 Yes

5. If the school intends to contract with an education management organization or other education service provider, indicate whether you or your spouse or any relative within the third degree of consanguinity or affinity knows any employees, officers, owners, directors or agents of that provider. If the answer is in the affirmative, please describe any such relationship. Not applicable because the school does not intend to contact with an education service

provider or school management organization.

- 6. If the school contracts with an education management organization or education service provider, please indicate whether you, your spouse or any relative within the third degree of consanguinity or affinity have a direct or indirect ownership, employment, contractual or management interest in the provider. For any interest indicated, provide a detailed description.
 N/A. X I / we have no such interest. Yes
- 7. If the school plans to contract with an education management organization or education service provider, indicate if you, your spouse or any relative within the third degree of consanguinity or affinity anticipate conducting, or are conducting, any business with the provider. If so, indicate the precise nature of the business that is being or will be conducted.

N/A. 🛛 I / we or my family do not anticipate conducting any such business. 🗌 Yes

- 8. Indicate whether you, your spouse or any relative within the third degree of consanguinity or affinity are a director, officer, employee, partner or member of, or are otherwise associated with, any organization that is partnering with the charter school. To the extent you have provided this information in response to prior items, you may so indicate.
 Noes not apply to me, my spouse or family. Yes
- 10. Indicate any potential ethical or legal conflicts of interests that would, or are likely to, exist should you serve on the school's board.

🛛 None. 🗌 Yes

Certification

I, <u>John Etre</u>, certify to the best of my knowledge and ability that the information I am providing to the State Public Charter School Authority as a prospective board member for <u>Karled</u> Charter School is true and correct in every respect.

Signature

Statement of Assurances

Revised June, 2015

1. The charter school herein named,

(name of charter school)

shall be organized and administered in accordance and compliance with all applicable provisions of Nevada Revised Statutes (NRS), Nevada Administrative Code (NAC), and all applicable federal statutes and regulations.

2. The charter school shall enter into a written agreement with the sponsor and comply with all provisions therein during the term of the agreement upon approval by the sponsor.

3. The charter school shall report any and all substantive changes in personnel, facilities, schedules, and other pertinent components of the operation of the charter school to the sponsor in a timely manner.

4. The charter school shall keep such records and provide such information in the time and manner prescribed in NRS and NAC that the sponsor, the school district in which the charter school is located, the Nevada Department of Education, the State Board of Education, and the State Public Charter School Authority require, as needed for the purpose of fiscal audit, and program evaluation and reporting, including, but not limited to, the following. The charter school shall:

- Account for the total number of students, per NRS 387.123 and NRS 387.1233;
- Submit accountability and progress reports throughout the academic year;
- Conduct and report on required examinations of students;
- Submit required reports on class size averages and types of teacher assignments, including students in programs of special education;
- Submit separate accounting for funds received for pupils with disabilities and gifted and talented pupils, per NRS 387.047 and 388.520;
- Submit required accounts of funds from federal sources, per federal reporting and audit requirements;
- Submit reports regarding student truancy, transiency, attendance and dropout rates;
- Submit reports of weapons and violence incidence;
- Describe suspensions and expulsions; and
- Comply with state, district, and federal statutes and regulations regarding instruction of disabled students including the development and implementation of Individual Education Plans (IEPs) for disabled students.

5. Permission is hereby granted to any member of the State Public Charter School Authority, Nevada Department of Education, the Nevada Department of Taxation, the Legislative Counsel Bureau, and the local school district to visit the school and inspect the premises and operating procedures of the school during business hours.

6. The charter school and its Governing Body shall comply with the provisions of NRS Chapter 281, Public Officers and Employees, General Provisions.

Notarized Statement

I, the undersigned, do consent and do solemnly swear (or affirm) that the information set forth in the forgoing application is true and complete to the best of my knowledge, and that failure to disclose pertinent information or the concealment of information or making false statements in the detailed application for operation of a charter school shall constitute valid grounds for refusal or revocation of permission to operate said school. The undersigned also affirms that the charter school herein named is obligated to enter into an agreement concerning the methods and procedures for the sponsor to monitor the progress of the charter school herein named. The undersigned affirms that the State Public Charter School Authority, Nevada Department of Education and the sponsor are entitled to access to financial and other records relating to the operation of the charter school.

Signature of Certifying Charter School Official

Name Printed

John Peter Etzell

Board Member

Title

7-23-2021

Date

Subscribed and sworn to before me

This 23 day of July

date

month year

(Notary Public Seal)



6

To be completed individually by each proposed charter school board member and member of the Committee to Form (including prospective employees or consultants). All forms must be signed by hand.

Serving on a public charter school board is a position of public trust and fiduciary responsibility. As a board member of a public school, you are responsible for ensuring the quality of the school program, competent stewardship of public funds, and the school's fulfillment of its public obligations and all terms of its charter.

As part of the application for a new charter school, the SPCSA requests that each prospective board member respond individually to this questionnaire. Where narrative responses are required, brief responses are sufficient.

The purpose of this questionnaire is twofold: 1) to give application reviewers a clearer introduction to the applicant team behind each school proposal in advance of the applicant interview, in order to be better prepared for the interview; and 2) to encourage board members to reflect individually as well as collectively on their common mission, purposes, and obligations at the earliest stage of school development.

Background

1. Name of charter school on whose Board of Directors you intend to serve

Rooted School

2. Full name

Home Address

Business Name and Address

Phone Number E-mail address

Melissa Lopez Gruenhagen



3. Brief educational and employment history and discussion of qualifications to serve on the board of this charter school.

BS in History and Secondary Education, Norther Arizona University, 2010

MA in Educational Leadership, Notre Dame University, 2015

Currently serving as a high school principal in North Las Vegas, serving an underserved population of students, the mission of the school is to prepare students for college and career.

4.

Resume and professional bio are attached.

- 5. Indicate whether you currently or have previously served on a board of a school district, another charter school, a non-public school or any not-for-profit corporation (to the extent not otherwise indicated in your response to Item 3, above).
 Does not apply to me. X Yes
- 6. Why do you wish to serve on the board of the proposed charter school?

marked by the percent of college matriculation, retention, and graduation rates as well as internship attendance and the percent of students who are employed in competitive tech fields.

Governance

- 1. Describe the role that the board will play in the school's operation.
- 2. How will you know if the school is successful at the end of the first year of operation? The school will have adequate enrollment, staffing, retention (students and teachers), and students demonstrate proficiency on internal and external standardized assessments.
- 3. How will you know at the end of three years of the school is successful? The school will have increased enrollment, high rates of staff and student retention, and demonstrated academic growth internal and external standardized assessments.
- 4. What specific steps do you think the charter school board will need to take to ensure that the school is successful? Establish a strategic plan, determine and track metrics to monitor progress toward the established goals, and help the leader to adapt their strategy to achieve the goals in the strategic plan.
- 5. How would you handle a situation in which you believe one or more members of the school's board were acting unethically or not in the best interests of the school? If I felt comfortable, I would address the issue with those people directly. If I did not feel comfortable or the concerns were egregious, I would bring my concerns to the Board Chair.

Disclosures

- Indicate whether you or your spouse or any relative within the third degree of consanguinity or affinity knows the other prospective board members for the proposed school. If so, please indicate the precise nature of your relationship.
 I / we do not know any such trustees. Yes
- Indicate whether you or your spouse or any relative within the third degree of consanguinity or affinity knows any person who is proposed to be or you anticipate will apply to be a school employee. If so, indicate the precise nature of your relationship.
 ☑ I / we do not know any such employees.
- 3. Indicate whether you or your spouse or any relative within the third degree of consanguinity or affinity knows anyone who is doing, or plans to do, business with the charter school (whether as an individual or as a director, officer, employee or agent of an entity). If so, indicate and describe the precise nature of your relationship and the nature of the business that such person or entity is transacting or will be transacting with the school.

 \square I / we do not know any such persons. \square Yes

I, ____Melissa Lopez Gruenhagen_____, certify to the best of my knowledge and ability that the information I am providing to the State Public Charter School Authority as a prospective board member for ____Rooted School_____ Charter School is true and correct in every respect.

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6/28/21 Date

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Statement of Assurances

Revised June, 2015

1. The charter school herein named, <u>Pooted School</u>

(name of charter school)

shall be organized and administered in accordance and compliance with all applicable provisions of Nevada Revised Statutes (NRS), Nevada Administrative Code (NAC), and all applicable federal statutes and regulations.

2. The charter school shall enter into a written agreement with the sponsor and comply with all provisions therein during the term of the agreement upon approval by the sponsor.

3. The charter school shall report any and all substantive changes in personnel, facilities, schedules, and other pertinent components of the operation of the charter school to the sponsor in a timely manner.

4. The charter school shall keep such records and provide such information in the time and manner prescribed in NRS and NAC that the sponsor, the school district in which the charter school is located, the Nevada Department of Education, the State Board of Education, and the State Public Charter School Authority require, as needed for the purpose of fiscal audit, and program evaluation and reporting, including, but not limited to, the following. The charter school shall:

- Account for the total number of students, per NRS 387.123 and NRS 387.1233;
- Submit accountability and progress reports throughout the academic year;
- Conduct and report on required examinations of students;
- Submit required reports on class size averages and types of teacher assignments, including students in programs of special education;
- Submit separate accounting for funds received for pupils with disabilities and gifted and talented pupils, per NRS 387.047 and 388.520;
- Submit required accounts of funds from federal sources, per federal reporting and audit requirements;
- Submit reports regarding student truancy, transiency, attendance and dropout rates;
- Submit reports of weapons and violence incidence;
- Describe suspensions and expulsions; and
- Comply with state, district, and federal statutes and regulations regarding instruction of disabled students including the development and implementation of Individual Education Plans (IEPs) for disabled students.

5. Permission is hereby granted to any member of the State Public Charter School Authority, Nevada Department of Education, the Nevada Department of Taxation, the Legislative Counsel Bureau, and the local school district to visit the school and inspect the premises and operating procedures of the school during business hours. 6. The charter school and its Governing Body shall comply with the provisions of NRS Chapter 281, Public Officers and Employees, General Provisions.

Notarized Statement

I, the undersigned, do consent and do solemnly swear (or affirm) that the information set forth in the forgoing application is true and complete to the best of my knowledge, and that failure to disclose pertinent information or the concealment of information or making false statements in the detailed application for operation of a charter school shall constitute valid grounds for refusal or revocation of permission to operate said school. The undersigned also affirms that the charter school herein named is obligated to enter into an agreement concerning the methods and procedures for the sponsor to monitor the progress of the charter school herein named. The undersigned affirms that the State Public Charter School Authority, Nevada Department of Education and the sponsor are entitled to access to financial and other records relating to the operation of the charter school.

Melissa Lopez Gmenhagen Signature of Certifying Charter School Official Name Printed 7/21/21 Principa Title Date Subscribed and sworn to before me

This 22nd day of July 2021

date month year



To be completed individually by each proposed charter school board member and member of the Committee to Form (including prospective employees or consultants). All forms must be signed by hand.

Serving on a public charter school board is a position of public trust and fiduciary responsibility. As a board member of a public school, you are responsible for ensuring the quality of the school program, competent stewardship of public funds, and the school's fulfillment of its public obligations and all terms of its charter.

As part of the application for a new charter school, the SPCSA requests that each prospective board member respond individually to this questionnaire. Where narrative responses are required, brief responses are sufficient.

The purpose of this questionnaire is twofold: 1) to give application reviewers a clearer introduction to the applicant team behind each school proposal in advance of the applicant interview, in order to be better prepared for the interview; and 2) to encourage board members to reflect individually as well as collectively on their common mission, purposes, and obligations at the earliest stage of school development.

Background

- 1. Name of charter school on whose Board of Directors you intend to serve **Rooted School**
- 2. Full name

Home Address

Business Name and Address

Phone Number E-mail address

Merrick Murray



- Brief educational and employment history and discussion of qualifications to serve on the board of this charter school.
- 4.

Resume and professional bio are attached. Yes

I am entering my 20th year of being an educator. I started my teaching career as a 3rd grade math teacher in Jacksonville, FL (2001). After moving back home to Chicago, I continued with Chicago Public Schools where I taught grades ranging from 4th-8th (2002-2013). Relocating to Las Vegas, I have had the pleasure of teaching 2nd, 4th, and 5th grades. I also taught Humanities (Leader in Me) to grades K-5.

I currently serve as a Learning Strategist, where I work directly with teachers on lesson planning and engagement strategies, provide professional development, and oversee monthly parent meetings (Title I).

 Indicate whether you currently or have previously served on a board of a school district, another charter school, a non-public school or any not-for-profit corporation (to the extent not otherwise indicated in your response to Item 3, above).
 X Does not apply to me. Yes

- 6. Why do you wish to serve on the board of the proposed charter school? I wish to serve on the board of this proposed charter school because they share my passion and philosophy of what school can and should be. Guiding students on a course to become self-sufficient, positive, and financially free members of society is a major shift. I would like to assist them in making that a reality here in Clark County.
- 7. What is your understanding of the appropriate role of a public charter school board member? The appropriate role of a charter school board member is to fully understand the vision and mission of the school, and work to assist the school leaders in fulfilling that vision and mission. Board members should work collaboratively with other board members, school leaders, and other stakeholders to ensure the school is continuously moving in the right direction.
- Describe any previous experience you have that is relevant to serving on the charter school's board (e.g., other board service). If you have not had previous experience of this nature, explain why you have the capability to be an effective board member.

Having served on my school's leadership team for several years has afforded me the chance to assist my administration with school decisions. Analyzing school data, making decisions on curriculum and instruction, and working directly with parents and students, shows my capacity for serving in the role of a board member.

I also served as a yearly elected member of my school's School Organizational Team (SOT) for many years. The SOT is school group (teachers, parents, and community members) tasked with making school budgetary decisions, administrator hiring, and school program/activity decisions.

9. Describe the specific knowledge and experience that you would bring to the board. Being a veteran educator and having completed the CCSD Leadership Academy, I come with a wealth of knowledge and understanding of what students in Clark County need to be successful. Not only that, but I am also active in the Las Vegas community and like to think I have my finger on the pulse of the needs here in Clark County.

School Mission and Program

1. What is your understanding of the school's mission and guiding beliefs?

For me, Rooted School's mission is clear: Provide students with options for success. They are not in the business of pigeon-holing students into one way of success (college), but rather providing them with skills and options they can use to be successful after graduating high school.

 What is your understanding of the school's proposed educational program?
 Rooted School will embrace self-directed learning, small group instruction, and projectbased learning. This is what is needed for students to be successful in the 21st century.
 What do you believe to be the characteristics of a successful school?

A successful school should have the heart of the community it serves, have input from all stakeholders (students, parents, teachers, and the community), and be engulfed in liberatory design (student options). A successful school not only address curricular needs, but also focuses on the whole child needs.

4. How will you know that the school is succeeding (or not) in its mission?

I will know that the school is succeeding the numbers (data) shows it. Students wanting to attend, parents and the community excited about the results, and students leaving Rooted prepared for the world. Those things combined will show me whether Rooted School is being successful.

Governance

- 1. Describe the role that the board will play in the school's operation.
- The board should be the body that plays a role in the hiring of the administration, and accountability of the administration. I do not believe the board should be involved in the day-to-day operations, but they should updated regularly on what is happening at the school.
- 2. How will you know if the school is successful at the end of the first year of operation?
- I will know whether the school is successful at the end of the first year if there is not a high teacher turnover, and if parents of current students register them for the upcoming school year.
- 3. How will you know at the end of three years of the school is successful?
- I will know if the school is successful after three years if there is growth with programs offered, student registration has increased, donations increase, and student success, and student perception. The main thing to look at is whether the school is adhering to the mission they set out to accomplish.
- 4. What specific steps do you think the charter school board will need to take to ensure that the school is successful?
- I think the charter school board should not be a distant part of the school. They should be known throughout the school by teachers, students, and parents. Not only that, but the board should have their eyes on all data related to the school. The board should make suggestions and make decisions related to the direction of the school, school programs, school budget, etc.
- 5. How would you handle a situation in which you believe one or more members of the school's board were acting unethically or not in the best interests of the school?
- If a situation were to arise where a member's behavior is in question, it should be brought to the board immediately. The board should then adhere to their rules/bylaws on how to proceed. I would assume there would be a vote set forth by the board on board member in question.

Disclosures

- 1. Indicate whether you or your spouse or any relative within the third degree of consanguinity or affinity knows the other prospective board members for the proposed school. If so, please indicate the precise nature of your relationship.
 - X 1 / we do not know any such trustees. Yes
- 2. Indicate whether you or your spouse or any relative within the third degree of consanguinity or affinity knows any person who is proposed to be or you anticipate will apply to be a school employee. If so, indicate the precise nature of your relationship.
 - X I / we do not know any such employees. Yes
- 3. Indicate whether you or your spouse or any relative within the third degree of consanguinity or affinity knows anyone who is doing, or plans to do, business with the charter school (whether as an individual or as a director, officer, employee or agent of an entity). If so, indicate and describe the precise nature of your relationship and the nature of the business that such person or entity is transacting or will be transacting with the school.

X I / we do not know any such persons. Yes

4. Indicate if you, your spouse or any relative within the third degree of consanguinity or affinity anticipate conducting, or are conducting, any business with the school. If so, indicate the precise nature of the business that is being or will be conducted.

X I / we do not anticipate conducting any such business. Yes

5. If the school intends to contract with an education management organization or other education service provider, indicate whether you or your spouse or any relative within the third degree of consanguinity or affinity knows any employees, officers, owners, directors or agents of that provider. If the answer is in the affirmative, please describe any such relationship.

Not applicable because the school does not intend to contact with an education service provider or school management organization.

X I / we do not know any such persons. Yes

6. If the school contracts with an education management organization or education service provider, please indicate whether you, your spouse or any relative within the third degree of consanguinity or affinity have a direct or indirect ownership, employment, contractual or management interest in the provider. For any interest indicated, provide a detailed description.

X N/A. I / we have no such interest. Yes

- 7. If the school plans to contract with an education management organization or education service provider, indicate if you, your spouse or any relative within the third degree of consanguinity or affinity anticipate conducting, or are conducting, any business with the provider. If so, indicate the precise nature of the business that is being or will be conducted. X N/A. I / we or my family do not anticipate conducting any such business. Yes
- Indicate whether you, your spouse or any relative within the third degree of consanguinity or affinity are a director, officer, employee, partner or member of, or are otherwise associated with, any organization that is partnering with the charter school. To the extent you have provided this information in response to prior items, you may so indicate.
 X Does not apply to me, my spouse or family. Yes
- Indicate any potential ethical or legal conflicts of interests that would, or are likely to, exist should you serve on the school's board.
 X None. Yes

Certification

I. <u>Merrick Murray</u>, certify to the best of my knowledge and ability that the information I am providing to the State Public Charter School Authority as a prospective board <u>member for <u>Rooted</u></u> Charter School is true and correct in every respect.

<u>07/13/21</u> Date

Statement of Assurances

Revised June, 2015

1. The charter school herein named, ____

Rooted School (name of charter school)

shall be organized and administered in accordance and compliance with all applicable provisions of Nevada Revised Statutes (NRS), Nevada Administrative Code (NAC), and all applicable federal statutes and regulations.

2. The charter school shall enter into a written agreement with the sponsor and comply with all provisions therein during the term of the agreement upon approval by the sponsor.

3. The charter school shall report any and all substantive changes in personnel, facilities, schedules, and other pertinent components of the operation of the charter school to the sponsor in a timely manner.

4. The charter school shall keep such records and provide such information in the time and manner prescribed in NRS and NAC that the sponsor, the school district in which the charter school is located, the Nevada Department of Education, the State Board of Education, and the State Public Charter School Authority require, as needed for the purpose of fiscal audit, and program evaluation and reporting, including, but not limited to, the following. The charter school shall:

- Account for the total number of students, per NRS 387.123 and NRS 387.1233;
- · Submit accountability and progress reports throughout the academic year;
- · Conduct and report on required examinations of students;
- Submit required reports on class size averages and types of teacher assignments, including students in programs of special education;
- Submit separate accounting for funds received for pupils with disabilities and gifted and talented pupils, per NRS 387.047 and 388.520;
- Submit required accounts of funds from federal sources, per federal reporting and audit requirements;
- Submit reports regarding student truancy, transiency, attendance and dropout rates;
- · Submit reports of weapons and violence incidence;
- · Describe suspensions and expulsions; and
- Comply with state, district, and federal statutes and regulations regarding instruction of disabled students including the development and implementation of Individual Education Plans (IEPs) for disabled students.

5. Permission is hereby granted to any member of the State Public Charter School Authority, Nevada Department of Education, the Nevada Department of Taxation, the Legislative Counsel Bureau, and the local school district to visit the school and inspect the premises and operating procedures of the school during business hours.

6. The charter school and its Governing Body shall comply with the provisions of NRS Chapter 281, Public Officers and Employees, General Provisions.

Notarized Statement

I, the undersigned, do consent and do solemnly swear (or affirm) that the information set forth in the forgoing application is true and complete to the best of my knowledge, and that failure to disclose pertinent information or the concealment of information or making false statements in the detailed application for operation of a charter school shall constitute valid grounds for refusal or revocation of permission to operate said school. The undersigned also affirms that the charter school herein named is obligated to enter into an agreement concerning the methods and procedures for the sponsor to monitor the progress of the charter school herein named. The undersigned affirms that the State Public Charter School Authority, Nevada Department of Education and the sponsor are entitled to access to financial and other records relating to the operation of the charter school.

Merrick M. Murray Signature of Certifying Charter School Official Name Printed

Teacher/Learning Strategist

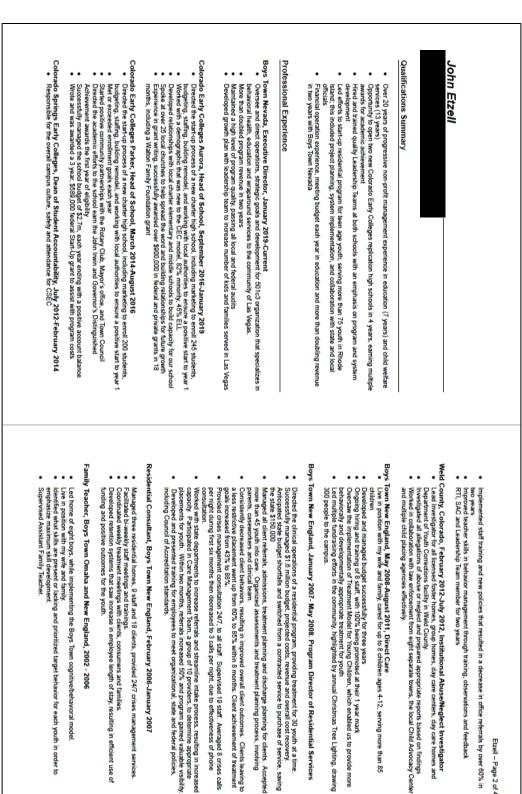
Title

07/24/21

Date

Subscribed and sworn to before me

This 23m day of



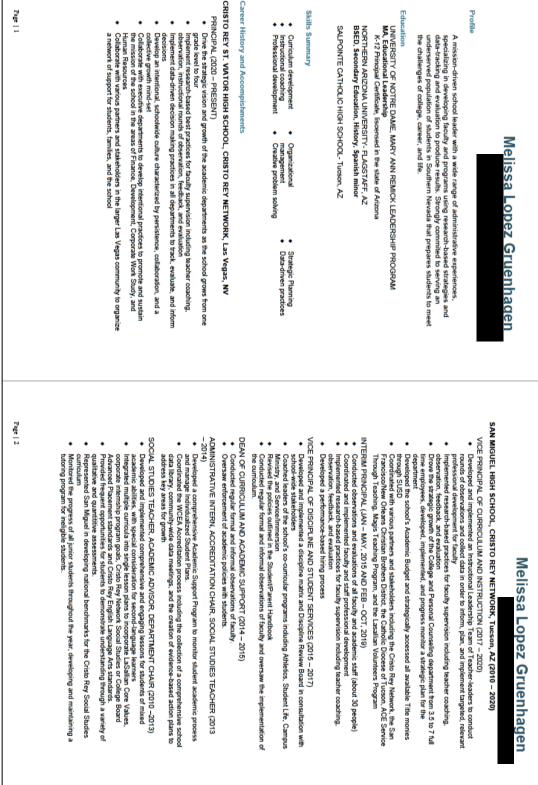
IOHN ETZELL – BOARD CHAIRPERSON

Etzell – Page 2 of 4

Etzell – Page 3 of 4	Etzell – Page 4 of 4
 Managed 30k budget for home operations and youth needs. 	Most recently John was Head of School for Colorado Early Colleges Aurora. In
Assistant Family Teacher, Omaha, Nebraska, 2000 - 2001	
 Provided life skills and educational development for 8 teenage boys. Supported Earnik Tabeling counts in home negretions including hudget and report writing 	inis fole ne successfully obtained grant funding and developed partnerships
 Supported Family Teaching couple in home operations, including budget and report writing. Volunteer History 	with local charter elementary and middle schools. In addition, he was
 Boys Scouts, Assistant Scoutmaster Troop 28, 2020-present Annoined to the Aurora Youth Commission in July 2017 (2) year annointment) 	successful in obtaining federal and private grants, including a Walton Family
 Youth Group parent volunteer. Our Lady of Lareto Catholic Church. 2015-2019 Boy Scouts of America. Volunteer Committee Chair, January 2012-January 2013 	Foundation grant.
 Boy Scouts of America, Volunteer, assist with camping trips, community projects and weekly Den meetings. Troop 50. Portsmouth, R.J. 2004-2010 AAU Basketball Rhode Island, founder and volunteer coach of Aquidneck Island Buildogs boys team. 	
2009-07	בולפון ווחומי ע מענופוטן א מפעופי ווטוון עופ טווואפואוע טו אר דווחווועא וו אר בעמי
Education	Minnesota.
 Master of Business Administration, Non-Profit Management – One full year complete Brandeis University- Heller School. Fart-time student, no degree earned Bachelor of Arts; Social Work 2000 University of St. Thomas, St. Faul, Minnesola 	
References	
 Bill Reardon, Retired Executive Director Boys Town of New England. 401-222-0649 Dan Ajamian, Head of School, Colorado Springs Charter Academy. 719-229-5207 John Loomis, Chief Operating Officer, Heligenics. 415-794-3403 	
Following his graduation from the University of St. Thomas, Etzell held	
numerous roles at Boys Town including Assistant Family Teacher, Family	
Teacher, Residential Consultant and Program Director of Residential Services.	
Etzell has over 20 years of progressive non-profit management experience in	
education and child welfare services. He has experience in new start-ups,	
including opening two new charter high schools in Colorado in four years and	
opening the Family Home program at Boys Town New England.	

MELISSA LOPEZ GRUENHAGEN BOARD MEMBER -**Career History and Accompishments** Skills Summary Profile PRINCIPAL (2020 - PRESENT) ٠ • • • SALPOINTE CATHOLIC HIGH SCHOOL- Tucson, AZ NORTHERN ARIZONA UNIVERSITY- FLAGSTAFF, AZ BSED, Secondary Education, History, Spanish minor Curriculum development Instructional coaching Professional development grade level to four the challenges of college, career, and life. man Resources

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Melissa Lopez Gruenhagen

Faculty Development

Planned and implemented professional development workshops for faculty in the following areas:

- The Gradual Release of Responsibility, based on the work of Fisher and Frey
 Crafting Higher Order Thinking Multiple Choice Items, based on the work of the Colleg Board and the Cristo Rey Network of Schools
- Collecting and Reviewing Observational Data, based on the work of the School Reform Initiative Benchmark Breakdown: Creating daily learning goals from content benchmarks, based on the
- work of Marzano, Hatie, and Bambrick-Santoyo
- Closure Activities, based on the work of Lemov, Marzano, Pickering, and Pollock
 Low Stakes, High Leverage Writing Strategies, based on the work of Young, Reichelt, White, and Woods
- Focus: The horizontal and vertical alignment of the Cristo Rey content and literacy curricula, based on the work of Schmoker
- High Impact Instructional Strategies, based on the work of Lemov, Marzano, Pickering, and Pollock
- · How to Grade for Learning: Understanding standards-based grading, based on the work of O'Connor

	BOIND MEMBER
CALIFORNIA STATE UNIVERSITY - SAN BERNARDINO Son Bernardino, CA Masters of Public Administration (Jun 2020) Relevant Coursework Public Budgeting and Finance Mgmt of Information Systems Administrative Leadership Mgmt of Information Systems Administrative Leadership Ngmt of Information Society Phi Alpha Alpha Honors Society Extracurricular Activities Rotary Club of Clearlake, Board Member NGO (North Coast Opportunities), Volunteer Coordinator Multicultural Student Leadership Alliance, Advisor Lake County Symphony Association, United States Peace Corps Volunteer - Ethiopia CALIFORNIA STATE UNIVERSITY - San Bernardino, CA Bachelors Business Administration - Finance (Jun 2010)	BILALIA
 EXPECUREMENT SENIOR SOFTWARE CONSULTANT Negometrix USA: Working Remotely / Apr 2019 - Present Primary leadership responsibilities included operations, research and development, customer service, and software implementation. Lead SO4 demonstrations on implementing and administering nation-wide best practice usage with their online purchasing systems. Introduced company-wide diversity and inclusion training. Co- founded the company-wide diversity and inclusion training. Co- founded the company of over 25 industry conferences to build and foster relationships with potential clients and securing over S50,000 in sales and renewal contracts. Operated a weekly shift on our customer service call center. Maintained a 97% customer satisfaction rating. Co-hosted 15 company webinars that reached an audience of 1000+ GRADUATE RESEARCH ASSISTANT – PROCUREMENT AND CONTRACTS CAUFORWIA STATE UNIVERSITY, SAW BERNARDIWO, San Bernardino, C4/ Sep 2018 - Apr 2019 Primary responsibilities included developing and records management program for filing, protection, and retrieval of records, and assure compliance with program. Categorized and prioritized Procurement Webpage improvement to facilitate an enhanced user experience. Analyze current policies and procedures, to ensure they align with 5,000+ lines of excels data sets to compile reports, charts, or graphs that describe and interpret findings of analyses. 	EDUCATION
Wordpress & Square Space Diversity & Inclusion PROFESSIONAL DEVELOPMENT & CERTIFICATION Excel Tips & Trips (Training) The Future of Equity and Diversity in Major Cities (Panel Discussion) Microaggressions in the Workplace (Training) Diversity and Inclusion in Procurement (Hosted) Online Data Protection (Training) Six Sigma Green Belt Certification (in progress)	Relevant Coursework Financial Analysis and Decisions Making Government/Business Relationships Information Management Excel for Business A DD T O N A L S K L L S Collaboration & Teamwork Proposal Writing (BFx) & Procurement Leadership & Management Cultural Competency Strategic Thought Leadership Microsoft 360 Office
 educational, vocational, or student activity programs. Created the district first Facebook page and developed a following of over 1,500 members in the first year. PROGRAM MANAGER WILMER AMINA CATER FOUNDATION, fields, CA / Jan 2014 - Aug 2015 Primary responsibilities included, fundraising, program development, event coordinating, community liaison, and operations. Managed the organization's social media accounts and increased engagements by 60% Developed and coordinated stakeholder fundraising events, increasing program profits by 30%. Created long-lasting community relationships with entrepreneurs, universities, and public service organization resulting in monetary or in-kind donation that covered 40% of event costs. Steered the organization thought a re-structing and digitization project, resulting in increased work efficiency. HEALTH ECONOMIC DEVELOPMENT ADVISER U.S. PEACE CORPS VOLUNTEER, Burdyiru May 2011 - Jul 2013 Primary responsibilities included collaborating with an Ethiopian counterpart in the health sectors, teaching English skills at a local high school and exchanging cultural knowledge. Coordinated the creation of a cattle fattening business working with 10 entrepreneurs to build a cattle fatm and purchase 5 cattle and cattle fattening if ed. Work with a team of Peace Corps volunteers to plan, organize, coordinate, and facilitate a week-long, over-night, health summer camp for over 100 high school aged Ethiopian students. Developed curriculum for 4 summer courses. Presented my 'best practices' for 50 incoming Peace Corps volunteers. 	 EXTENDED LEARNING SERVICES - YOUTH SERVICES COORDINATOR KONOCT UNIFIED SCHOOL DISTRICT, LOWER Lake, CA / Aug 2015 - Jun 2018 Primary responsibilities included managing department's \$500,000 budget, supervising staff, program development and management, website/social media management, operations, program innovation and program metrics reporting. Supervised 20+ employees district-wide in the afterschool development programs. Managed over 50 employees and staff during summer learning program Created and maintaining strategic partnerships with members of the business and non-profit community that increased community participation by over 75%. Plan, develop, and provide training and staff development programs, using knowledge of the effectiveness of methods such as classroom training, demonstrations, on-the-job training, meetings, conferences, and workshops. Plan, direct, and montor instructional methods and content of

BILALIA MUBASHSHIR

- BOARD MEMBER

MERRICK MURRAY - BOARD MEMBER



MERRICK M. MURRAY

SKILLS & ABILITIES

- Teacher training and development
- Strategic planning
- Project management
- Curriculum design
- Classroom management
- Differentiated instruction
- Response to intervention
- Special education/inclusion
- Data analysis

EDUCATION

CONCORDIA UNIVERSITY CHICAGO, RIVER FOREST, IL Master of Arts, School Leadership, May 2009

WALDEN UNIVERSITY, MINNEAPOLIS, MN

Master of Science, Curriculum, Instruction, and Assessment, April 2006

WESTERN ILLINOIS UNIVERSITY, MACOMB, IL Bachelor of Science, Elementary Education, May 2001

PROFESSIONAL EXPERIENCE

CLARK COUNTY SCHOOL DISTRICT Ira J. Earl Elementary School (August 2013-present)

Assist K-5 educators with engaging strategies for lessons, student discourse, and classroom management.

- Coordinate all site-based state and district mandated assessments (2019-present)
- Manage and update all Title I budget records (2019-present)
- Coordinate and plan monthly parent meetings (2019-present)
- Facilitate site-based trainings (2019-present)
- Implemented The Leader in Me instruction to all K-5 students (2017-2019)
- Successfully completed CCSD Leadership Academy coursework (2016)
- Taught language arts, math, science, and social science to diverse groups of 2nd, 4th, and 5th grade students (2013-2017)
- Utilized i-Ready, SBAC, WIDA, and AIMS Web data to drive classroom instruction (2013-2019)

CHICAGO PUBLIC SCHOOLS

Ashburn Community Elementary School (February 2005-June 2013) Bethune Elementary School (August 2002-February 2005)

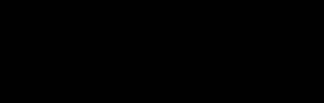
Instructed students ranging from 1# - 8th grade in language arts, math, science, and social science.

- Used mClass data and NWEA data to drive classroom instruction
- Supervised and assisted students in the Drama Club, Chess Club, and Student Council
- Coordinated and implemented the first history fair for the school

LEADERSHIP HIGHLIGHTS

- Fellow for Great School Fellowship (2020)
- Nevada Collaboratory Facilitator Culturally Responsive Teaching (2018-present)
- Program Coordinator for the Ira J. Earl Teacher Mentoring Program (2016-present)
- School Improvement Team, Earl Elementary (2015-present)
- Lighthouse Leadership Team, Earl Elem., (2015-2016)
- PLC Math Leader and Facilitator (2015)
- RTI Co-Chair, Earl Elem. (2014-2016)

REFERENCES



GREER PERKINS -

BOARD MEMBER

GREER A. PERKINS



Educational Advocate & Service Provider



WHO AM I?

A steward of a revolutionary call to action that encourages others to develop relationships and take stands for underserved students and families in the community. An advocate for fellow educators and community partners to promote and provide equity and access to resources and experiences in order to foster success within all students.

SKILL SETS

- Educational Leadership
- Early childhood instructional delivery
- Operational and administrative abilities
- Public speaking and communication through Toastmasters International
- Direct, honest, ethical decision making
- Oral and written communication abilities
- Collegiate recognition for social justice advocacy programming

EDUCATION

Sierra Nevada University

- Aug. 2019- {Resent / Incline , NV
- Degree Sought M. Ed in Educational Administration

University of Nevada Las Vegas

Aug. 2010- May 2012 / Las Vegas, NV M. Ed - Masters in Early Childhood Education

Gonzaga University

Aug. 2006- May 2010 / Spokane, WA

B. Ba - Bachelor of Business Administration

PROFESSIONAL EXPERIENCE

First Grade Teacher / Grade Level Chair

Lomie G. Heard ES / Aug. 2019 – Present

- Fully integrated Tier 1, 2 & 3 math and science instruction in a departmentalized, ability group, flexible seating classroom environment.
- Organized and led grade weekly PLC meetings
- Lead weekly data learning seminars focused on using assessment data to improve instruction.
- Recorded 87% of students taught meet or exceed their growth goal based on winter MAP assessment data.

First Grade Teacher; First Grade Chair; RTI Coordinator

Democracy Prep at Agassi Campus / June 2018 - July 2019

- Fully integrated Tier 1, 2 & 3 rigorous math, reading and writing content while creating several resources independently
- Provided individual coaching and mentoring to several teachers as grade level lead
- Developed and delivered a variety of assessment data to refine curricula and instructional practice.
- Created and delivered professional development presentations on the RTI process as the RTI Coordinator

Early Childhood Educator

Clark County School District / Aug. 2013 - June 2018

- Fully integrated Tier 1, 2 & 3 reading and math instruction in the classroom while utilizing the Leader in Me programs and Zoom Curriculum in kindergarten and 1st grade classrooms.
- Achieved between 65% and 75% growth for all students
- Created and delivered several professional development presentations focused on cultural competency and culturally responsive teaching practices as the chair of the Professional Learning Action Team
- Conducts parent teacher conferences on academic and behavioral progress as well as enter educational and behavioral data in student data binders and online data tracking system
- I Facilitated standardized assessments such as MAP and WiDA

Tier 2 Teacher

Acelero Learning Herb Kaufman/ Aug. 2010 - Aug. 2013

- Plans for and provides a safe, educational and engaging environment for children ages 3-5 while mentoring other teachers.
- Conducts various center director duties such as: Procare billing, health & Safety checks, licensing preparations, scheduling etc.

Teach for America Las Vegas Valley 2010 Corps Member

August 2010 – August 2012

- Completed corps commitment in early childhood education
- Created project plans, maintained regional events budget, and assisted with regional operations duties as operations team member
- I Facilitated and guided incoming corps members through the induction, licensure, and new teacher process as transition team coordinator

Attachment 6 BOARD PROPOSED BYLAWS, ETHICS & CONFLICT OF INTEREST POLICY

Rooted School Clark County Board Proposed Bylaws

BYLAWS OF ROOTED SCHOOL CLARK COUNTY

ARTICLE I NAME AND OFFICE

1.01 Name. The name of this corporation shall be Rooted School-Clark County ("RS-CC", the "Corporation"). The business of the Corporation may be conducted under the firm name "Rooted School-Clark County".

1.02 Registered Office. The registered office of the Corporation shall be located in the state of Nevada at such place as may be fixed from time to time by the Board of Trustees upon filing of such notices as may be required by law. The registered agent shall have a business office identical with such registered office.

ARTICLE II

CHARITABLE PURPOSES/NEGATION OF PECUNIARY GAIN

2.01 Charitable purposes. The Corporation is organized exclusively for charitable, scientific, literary, or educational purposes within the meaning of §501(c)(3) of the Internal Revenue Code of 1986, as amended, or corresponding provisions of any subsequent federal tax laws.

Notwithstanding any provisions of these Bylaws to the contrary, this Corporation shall not conduct or carry on any activities not permitted to be conducted or carried on by an organization qualified for tax-exempt status under §501(c)(3) of the Internal Revenue Code of 1986, as amended, or corresponding provisions of any subsequent federal tax laws. Furthermore, this Corporation shall neither conduct nor carry on any activities which subject the Corporation to liability for excise taxes imposed pursuant to §4941, 4942, 4943, 4944, or 4945 of the Internal Revenue Code of 1986, as amended, or corresponding provisions of any subsequent federal tax laws.

The Corporation shall not devote any part of its activities to carrying on propaganda, or otherwise attempting to influence legislation; nor shall the Corporation participate or intervene in any political campaign (including the publishing or distributing of statements) on behalf of any candidate for public office. 2.02 Negation of pecuniary gain. No part of the net earnings of this Corporation shall ever inure to or for the benefit of or be distributable to its directors, officers, or other private persons, except that the Corporation shall be empowered to pay reasonable compensation for services rendered and to make payments and distributions in furtherance of the exempt purposes for which it was formed.

ARTICLE III MEMBERS

The Corporation shall have no members.

3.01 Membership.

ARTICLE IV BOARD OF TRUSTEES

The management of all the affairs, property, and 4.01 Number and Powers. interests of the Corporation shall be vested in a Board of Trustees. Members of the Board of Trustees shall be nominated by the nominating committee which shall be appointed by the Board of Trustees prior to the Annual Meeting or any Special Meeting the purpose of which includes electing new members to the Board of Trustees. Members of the Board of Trustees at the Annual Meeting or any Special Meeting the purpose of which includes electing new members of the Board of Trustees. The Board of Trustees shall consist of no fewer than (5) and no more than (9) Members. The terms of the trustees shall be two (2) years, expiring at the annual meeting following their election, except that at least one-third of the initial Members of the Board of Trustees shall be elected to serve an initial two (2) year term, and of the initial Members of the Board of Trustees shall be elected to serve an initial two (2) year term, and of the initial Members of the Board of Trustees shall be elected to serve an initial three (3) year term to ensure that approximately one-third of the Board is elected in any given year thereafter. At each annual meeting, the directors shall be elected to succeed the directors whose terms expire at such meeting. In addition to the powers and authorities expressly conferred upon it by these Bylaws and Articles of Incorporation, the Board of Trustees may exercise all such powers of the Corporation and do all such lawful acts and things as are necessary to carry out the business of the Corporation.

4.02 Term Limits. Directors may serve up to a maximum of four (4) terms or a total of nine (9) years, after which he or she may not be re-elected for one (1) term. Notwithstanding the foregoing, the first terms for all initial members of the Board

of Trustees shall be two (2) years. Such term limits shall be calculated from the adoption date of these Bylaws forward (i.e., past terms will not be counted in the term limits, whereas any term currently being served as of the adoption date will be counted in the term limits regardless of how many terms a Director may have served in the past. Notwithstanding the foregoing , in the event the Corporation cannot find a new member to fill the vacant position on the Board of Trustees, the remaining members of the Board of Trustees may, by unanimous vote, elect to waive the term limits provisions for such period.

- 4.03 Change of Number.
 - a. The current number of directors serving may at any time be increased or decreased, between five (5) and nine (9) Members, by a majority of the entire Board of Trustees, but no decrease shall have the effect of shortening the term of any incumbent director.
 - b. The number of directors authorized to serve on the Board of Trustees under these Bylaws may at any time be increased or decreased by an amendment of these Bylaws, but no decrease shall have the effect of shortening the term of any incumbent director.

4.04 Vacancies. All vacancies in the Board of Trustees, whether caused by resignation, death or otherwise, may be filled by the affirmative vote of a majority of the remaining directors. At such time as the Board of Trustees may drop below the minimum number of five (5), whether by resignation, death or otherwise, the Board of Trustees shall be authorized to carry out business with that reduced number for the maximum period required to fill the vacant position(s). A director elected to fill any vacancy shall hold office for the unexpired term of the predecessor director and until a successor is elected and qualified.

4.05 Regular Meetings. Regular meetings of the Board of Trustees may be held at the Corporation's business office or at such other place or places, either within or without Clark County, as the Board of Trustees may from time to time designated. The annual meeting shall be held each year during the month of August at a date, time and place as the Board of Trustees shall designate by written notice. In addition to the annual meeting, there shall be regular meetings of the Board of Trustees held, with proper notice, not less frequently than once each calendar month. Minutes shall be kept at all meetings of the Board of Trustees. 4.06 Special Meetings. Special meetings of the Board of Trustees may be called at any time by the President or upon written request by any two directors. Such meetings shall be held at the registered office of the Corporation or at such other place or places as the directors may from time to time designate. When called by written request of any two directors, such directors shall be charged with providing proper notice of the special meeting in accordance with §4.07. Minutes shall be kept of all Special Meeting:

4.07 Notice. Notice of all meetings of the Board of Trustees (regular, annual and special) shall be given to each director by seven (7) days prior service of the same by email, letter, or personal delivery. Such notice shall designate the time and place of the meeting.

4.08 Posting Electronic Notice. Notice may be provided to directors by posting the notice on an electronic network and delivering to such directors a separate record of the posting, tougher with comprehensible instructions regarding how to obtain access to the posting on the electronic network. Notice is effective when it has been posted to an electronic network and a separate record of the posting has been delivered to the recipient as provided by this §4.08.

4.09 Waiver of Notice. Waiver of notice can be made in one of the following two ways:

- a. Attendance of a director at a meeting shall constitute a waiver of notice of such meeting, except where a director attends for the express purpose of objecting to the transaction of any business because the meeting is not lawfully called or convened; or
- b. A waiver of notice signed by the director or directors, whether before or after the time stated for the meeting.

4.10 Quorum. A majority of the Members of the entire Board of Trustees shall be necessary and sufficient at all meetings to constitute a quorum for the transaction of business.

4.11 Manner of Acting. The act of the majority of the directors present at a meeting at which there is a quorum shall be the act of the Board of Trustees, unless the

vote of a greater number is required by these Bylaws, the Articles of Incorporation or applicable Nevada law.

4.12 Voting by Electronic Transmission. Votes for successor directors may be cast by electronic transmission, provided that the Corporation has designated an address, location or system to which the ballot may be electronically transmitted.

4.13 Meetings by Telephone. Members of the Board of Trustees or any committee designated by the Board of Trustees may participate in a meeting of such Board of Trustees or committee via conference telephone or similar communications equipment by means of which all persons participating in the meeting can hear each at the same time. Participation via such equipment shall constitute presence in person at a meeting.

4.14 Registering Dissent. A director who is present at a meeting of the Board of Trustees at which action on a corporate matter is taken shall be presumed to have assented to such action unless the director's dissent or abstention shall be entered in the minutes of the meeting, or unless the director shall file a written dissent or abstention to such action with the person acting as the secretary of the meeting before the adjournment thereof, or shall forward such dissent by registered mail to the Secretary of the Corporation immediately after the adjournment of the meeting. Such right to dissent to abstantishall not apply to a director who voted in favor of such action.

4.15 Remuneration. No stated salary shall be paid to directors, as such, for their service, but by resolution of the Board of Trustees, a fixed sum and expenses of attendance, if any, may be allowed for attendance at each annual, regular or special meeting of such Board of Trustees; provided that nothing herein contained shall be construed to preclude any director from serving the Corporation in any other capacity and receiving compensation therefore. Members of ad hoc or standing committees may be allowed like compensation for attending committee meeting.

4.16 Loans. No loans shall be made by the Corporation to any director.

4.17 Removal. Any director may be removed at any time, with or without cause, by the affirmative vote of two-thirds (%) of the whole Board of Trustees. Notice stating that a named director shall be considered for removal and the cause, if any, for

such removal must be mailed to the director prior to a duly called meeting of the Board of Trustees at the same time and in the same manner prescribed for the notice of the meeting.

4.18 Action by Directors without a Meeting. Any action required or permitted to be taken at a meeting of the directors, or of a committee thereof, may be taken without a meeting by a written consent setting forth the action so to be taken, signed by all the directors, or all of the Members of the committee, as the case may be, before such action is taken. Such consent shall have the same effect as a unanimous vote. Any such action may also be ratified after it has been taken, either at a meeting of the directors or by unanimous written consent.

ARTICLE V OFFICERS

5.01 Designations. The officers of the Corporation may be a Chair, Vice Chair, Treasurer, Secretary and Assistant Secretary, and such other officers as the Board of Trustees may designate. The Corporation shall have a Chair and Secretary. All officers shall be elected at the annual meeting for terms of one (1) year by the Board of Trustees. Such officers shall hold office until their successors are elected and qualify. Any two or more offices may be held by the same person, except the offices of Chair and Secretary.

5.02 The Chair. The Chair shall preside at all meetings of the Board of Trustees, shall perform such other duties as are incident to the office or are properly required of the Chair by the Board of Trustees.

5.03 Vice Chair. During the absence or disability of the Chair, the Vice Chair shall exercise all the functions of the Chair. The Vice Chair shall have such powers and discharge such duties as may be assigned to the Vice Chair from time to time by the Board of Trustees.

5.04 Secretary and Assistant Secretary. The Secretary, or his/her designee, shall issue notices for all meetings, except for notices of special meetings of the Board of Trustees which are called by the requisite number of directors, such directors being charged with giving proper notice, shall keep minutes of all meetings, shall have charge of the corporate books, shall make such reports and perform such other duties as are

Officer, if selected, may be compensated for services in that capacity in such amount and manner as the Board of Trustees shall determine.

6.03 Board Service. The Chief Executive Officer, Chief Academic Officer, and/or other designee of the Board of Trustees may serve on the Board of Trustees in an Ex-Officio nonvoting capacity at the direction of the Board of Trustees.

6.04 Liaison. The Chief Executive Officer and Chief Academic Officer shall act as liaisons between the Board of Trustees and the staff and employees of the Corporation. The Chief Executive Officer shall have full exclusive authority with respect to employees of the Corporation. Dursuant to any personnel or other policies adopted by the Board of Trustees. The Chief Executive Officer shall also make salary recommendations for the employees of the Corporation. See §5.20.

6.05 Removal. The Chief Executive Officer and Chief Academic Officer may be removed at any time, with or without cause, by the affirmative vote of a majority of the whole Board of Trustees.

6.06 Loans. No loan shall be made by the Corporation to the Chief Executive Officer and Chief Academic Officer.

ARTICLE VII COMMITTEES

7.01 Creation. The Board of Trustees may appoint, from time to time, standing or ad hoc committees. Such committees may be vested with such powers as the may determine by resolution passed by a majority of the Board of Trustees. Provided that no such committee shall have the authority of the Board of Trustees in reference to amending, altering, or repealing these Bylaws; electing, appointing, or removing any Member of any such committee or any director or officer of the Corporation, amending the Articles of Incorporation; authorizing the sale, lease, or exchange of all or substantially all of the property and assets of the Corporation other than in the ordinary course of business, authorizing the voluntary dissolution of the Corporation or adopting a plan for the distribution of the assets of the Corporation; amending, altering or repealing may resolution of the Board of Trustees which by its terms provides that it shall not be amended, altered, or repealed by such committee or such other act(s) as only the Board of

Trustees may perform under the Corporation's Articles of Incorporation and Bylaws or otherwise under law. All committees so appointed shall keep regular minutes of the transactions of their meetings and shall cause them to be recorded in books kept for that purpose in the office of the Corporation. The designation of any such committee and the delegation of authority thereto, shall not relieve the Board of Trustees, or any Board Member of any responsibility imposed by Jaw.

7.02 Standing and Ad Hoc Committee

- a. Standing Committee. A committee designated as a Standing Committee shall serve continuously until such time as the Board of Trustees dissolves such committee by a majority vote of the full Board of Trustees. The following Standing Committees will be charged with assisting the Board of Trustees with the continuous management and operation of the Center; Governance, Finance, Development, Academic Excellence, and CEO(CA) Evaluation & Support.
- b. Ad Hoc Committee. A committee designated as an Ad Hoc Committee shall serve on a temporary basis for the purpose of assisting the Boar particular matter as the Board of Trustees may designate and shall be automatically dissolved at the conclusion of the matter for which they were created or upon a majority vote of the full Board of Trustees.

7.03 Membership. Membership on Standing or Ad Hoc Committees shall be by appointment of the Board of Trustees. Upon formation of a committee, at least one Board Member or officer starting to the start of the Board of Trustees and the committee. The Board Member or officer serving on the committee shall be the liaison between the Board of Trustees and the committee. If at any time no Board Member or officer is serving on a committee, used committee, the abard of Trustees at each Board meeting as to the activities, progress, needs and concerns of the committee. If at any time a Board member layers a committee, the Board must appoint a replacement at the next regularly scheduled meeting of the Board.

7.04 Duties-Communication with Board of Trustees. Committees shall be charged with whatever duties the Board of Trustees may designate in accordance with the purposes for which the committee was created. All committees shall have an obligation to ensure that the minutes of committee meetings are kept and regular reporting is made to the Board of Trustees.

incident to the office, or are properly required of the Secretary of the Board of Trustees and shall maintain all committee reports.

5.05 Treasurer. The Treasurer, or his/her designee, shall have the custody of all monies and securities of the Corporation and shall keep financial records. The Treasurer, or his/her designee, shall disburse the funds of the Corporation in payment of the just demands against the Corporation or as may be ordered by the Board of Trustees (taking proper vouchers for such disbursements) and shall render to the Board of Trustees from time to time as may be required, an account of all transactions undertaken as Treasurer and of the financial condition of the Corporation. The Treasurer shall perform such other duties as are incident to the office or are properly required by the Board of Trustees. The Treasurer shall provide a monthly report of the financial condition of the Corporation to the Board of Trustees.

5.06 Delegation. If any officer of the Corporation is absent or unable to act and no other person is authorized to act in such officer's place by the provisions of these Bylaws, the Board of Trustees may from time to time delegate the powers or duties of such officer to any other officer or any director or any person it may select.

5.07 Vacancies. Vacancies in any office arising from any cause may be filled by the Board of Trustees at any regular or special meeting of the Board of Trustees.

5.08 Other Officers. The Board of Trustees may appoint or retain such other officers or as agents as it shall deem necessary or expedient, who shall hold their offices for such terms and shall exercise such powers and perform such duties as shall be determined from time to time by the Board of Trustees.

09 Loans. No loan shall be made by the Corporation to any officer.

5.10 Term-Removal. The officers of the Corporation shall hold office until their successors are chosen and qualified. Any officer or agent elected or appointed by the Board of Trustees may be removed at any time, with or without cause, by the affirmative vote of a majority of the whole Board of Trustees, but such removal shall be without prejudice to the contact rights, if any of the person so removed.

5.11 Bonds. The Board of Trustees may, by resolution, require any and all of the officers to provide bonds to the Corporation, with surety or sureties acceptable to the Board of Trustees, conditioned for the faithful performance of the duties of their respective offices, and to comply with such other conditions as may from time to time be required by the Board of Trustees.

5.12 Salaries. The officers of the Corporation shall receive no salary. However, officers shall be reimbursed for reasonable expenses actually incurred in the performance of their duties. The Chair may recommend to the Board of Trustees the salary of the Chief Executive Officer and Chief Academic Officer, if any, and the Chief Executive Officer shall recommend salaries for other employees, if any, and the Board of Trustees thall approve or amend any such recommendations.

5.13 Repayment. Any payments made to a director, officer, or other employee of the Corporation for compensation, salary, bonus, interest, rent, or expense incurred by the party which shall be determined to be unreasonable in whole or in part by the Internal Revenue Service pursuant to §4941(d)(2)(E) of the Internal Revenue Code of 1986, as amended, shall be reimbursed by such director, officer, or employee to the Corporation to the full extent of such determination of unreasonable ine view of Transfer to the director, officer, or employee, subject to the determination of the Board of Trustees to enforce repayment of each such amount. In lieu of repayment by the director, officer, or employee, subject to the determination of the Board of Trustees, amounts may be withheld from future compensation or expense reimbursement payments of the director, officer, or employee, to the extent permitted by law, until the amount owed to the Corporation shall have been recovered.

ARTICLE VI

CHIEF EXECUTIVE OFFICER/CHIEF ACADEMIC OFFICER/EX OFFICIO

6.01 Chief Executive Officer. The Board of Trustees may select a Chief Executive Officer who shall be responsible for the administration and conduct of the business and affairs of the Corporation pursuant to guidelines and job description established by the Board of Trustees. The Chief Executive Officer if selected, may be compensated for services in that capacity in such amount and manner as the Board of Trustees shall determine.

6.02 Chief Academic Officer. The Board of Trustees may select a Chief Academic Officer who shall be responsible for the administration and conduct of the pedagogical and academic performance measures of the Corporation pursuant to guidelines and job description established by the Board of Trustees. The Chief Academic

7.95 Nomination of Board Members. While the Governance Committee is responsible for Member recommendations to the Board, all committees shall have the ability to nominate Members to serve on the Board of Trustees. The Board of Trustees shall consider the nominations made by committees at each regular election of the Board of Trustees. If a vacancy occurs, for whatever reason, with respect to a Board Member who was charged with acting as a committee liaison, the committee upon which that Board Member served shall nominate a replacement from among the committee membership. The Board of Trustees shall discretion to elect or reject candidates nominate by committees.

7.06 Dissolution. The Board of Trustees shall have the ability to dissolve any Standing or Ad Hoc Committee at any time by a majority vote of the full Board of Trustees. Ad Hoc Committees may also be automatically dissolved upon completion of the purposes for which they were created. Standing Committees shall serve indefinitely until dissolution by the Board of Trustees.

ARTICLE VIII RULES OF PROCEDURES

The rules of procedure at meetings of the Board of Trustees and committees of the Board of Trustees shall be rules as adopted by the Board of Trustees, so far as applicable and when not inconsistent with these Bylaws, the Articles of Incorporation or any further resolution of the Board of Trustees.

ARTICLE IX DEPOSITORIES

The monies of the Corporation shall be deposited in the name of the Corporation in such bank or banks or trust company or trust companies as the Board of Trustees shall designate, and shall be drawn from such accounts only by check or other order for payment of money signed by such persons, and in such manner, as may be determined by resolution of the Board of Trustees.

ARTICLE X

Except as may otherwise be required by law, any notice to any director or officer may be delivered personally or by mail or e-mail. If mailed, the notice shall be delivered when deposited in the United States mail, addressed to the addresses at this or her last known address in the records of the Corporation, postage prepaid. If e-mailed, the notice shall be deemed to have been delivered when sent, unless returned by an automated notification of failure to deliver.

ARTICLE XI

INDEMNIFICATION OF OFFICERS, DIRECTORS, EMPLOYEES, AND AGENTS The Corporation shall indemnify its officers, directors, employees, and agents to the greatest extent permitted by law. The Corporation shall have power to purchase and maintain insurance on behalf of any person who is or was a director, officer, employee, or agent of the Corporation or who is or was serving at the request of the Corporation as an officer, employee, or agent of another Corporation, partnership, joint venture, trust, other enterprise, or employee benefit plan, against any liability asserted against such person and incurred by such person in any such capacity or arising out of any status as such, whether or not the Corporation would have the power to indemnify such person against such liability under the provisions of this Article.

ARTICLE XII CONTRACTS AND CONVEYANCES

All contracts, deeds, conveyances, negotiable instruments, and other instruments of like character which have first been approved by the Board of Trustees shall be signed by the Chair or Vice Chair and by the Secretary or as otherwise directed by the Board of Trustees. No contract of any officer of the Corporation shall be valid without previous authorization or subsequent ratification of the Board of Trustees.

> ARTICLE XIII BOOKS AND RECORDS

The Corporation shall keep correct and complete books and records of account and shall keep minutes of the proceedings of its Board of Trustees; and shall keep at its

registered office or principal place of business, or at the office of its transfer agent or registrar, a record of its directors, giving the names and addresses of all directors. ARTICLE XIV AMENDMENTS A majority of the entire Board of Trustees shall have power to make, alter, amend, and repeal the Bylaws of this Corporation. Adopted by resolution of the Corporation's Board of Trustees on _______, 2021. Secretary

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Rooted School Clark County Code of Ethics

rootedschool

CODE OF ETHICS

Rooted School Directors, officers, and employees shall at all times be in compliance with the following Code of Ethics:

 The Board of Directors shall conduct or direct the affairs of the School and exercise its powers subject to the applicable limitations of federal and state law, the School's charter, and its bylaws. The Board may delegate aspects of the management of school activities to others, so long as the affairs of the school are managed, and its powers are exercised, under the Board's ultimate jurisdiction.

2. Every Director has the right to participate in the discussion and vote on all issues before the Board or any Board Committee, except that any Director shall be excused from the discussion and vote on any matter involving such Director relating to (a) a "self-dealing transaction" (see below); (b) a conflict of interest; (c) indemnification of that Director uniquely; or (d) any other matter at the discretion of a majority of the Directors.

3. The Board of Directors and the employees of the School shall not engage in any "self-dealing transactions," except as approved by the Board. "Self-dealing transaction" means a transaction to which the school is a party and in which one or more of the Directors has a material financial interest. Notwithstanding this definition, the following transaction is not a self-dealing transaction and is subject to the Board's general standard of care: a transaction that is part of a public or charitable program of the Corporation, if the transaction (a) is approved or authorized by the Board in good faith and without unjustified favoritism, and (b) results in a benefit to one or more

Directors or their families because they are in a class of persons intended to be benefited by the program.

4. Any Director or Officer having an interest in a contract, other transaction, or program presented to or discussed by the Board of Directors for authorization, approval, or ratification shall make a prompt, full, and frank disclosure to the Board of his or her interest prior to its acting on such contract or transaction. Such disclosure shall include all relevant and material facts known to such person about the contract or transaction, which might reasonably be construed to be adverse to the Board's interest. A person shall be deemed to have an "interest" in a contract or other transaction if he or she is the party (or one of the parties) contracting or dealing with the school, or is a Director or Officer of or has a significant financial or influential interest in the entity contracting or dealing with the School.

 Directors representing any not-for-profit corporation proposing to do business with Rooted School shall disclose the nature and extent of such business propositions.

6. No Director, officer, or employee of a for-profit corporation having a business relationship with Rooted School shall serve as a voting member of the Board for the duration of such business relationship, provided; however, that this provision shall not apply to the following: a) Individuals associated with partnership, limited liability corporation, or professional corporation, including but not limited to doctors, accountants, and attorneys; b) Individuals associated with the educational entity (including but not limited to schools of education) some of whose faculty may be providing paid services directly or indirectly to Rooted School; or c) Individuals associated

Rooted School Clark County Conflict of Interest Policy

CONFLICT OF INTEREST POLICY OF

ROOTED SCHOOL

Article I

Purpose

The purpose of the conflict of interest policy is to protect this tax-exempt organization's (the "Organization") interest when it is contemplating entering into a transaction or arrangement that might benefit the private interest of an officer or director of the Organization or might result in a possible excess benefit transaction. This policy is intended to supplement, but not replace, any applicable state and federal laws governing conflict of interest applicable to nonprofit and charitable organizations.

Article II

Definitions

1. Interested Person

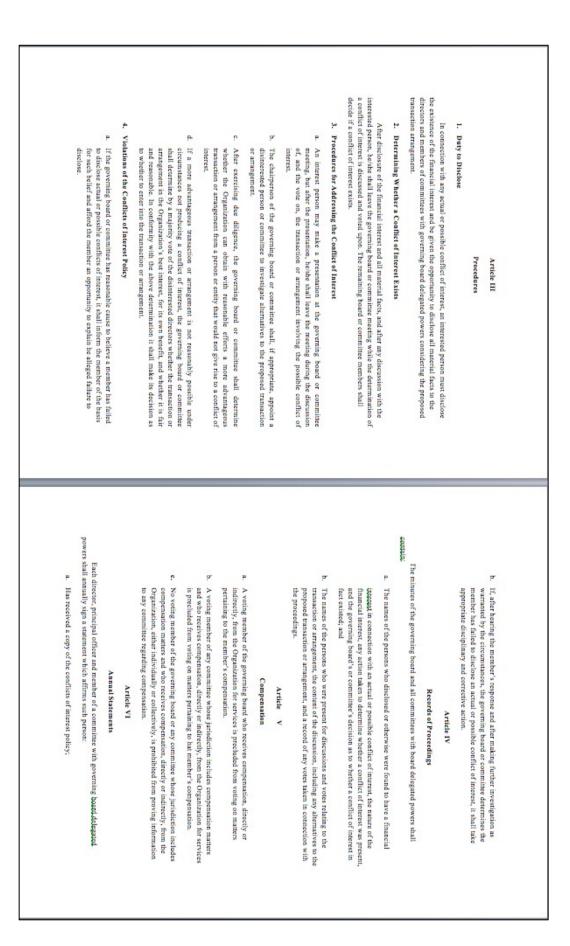
Any director, principal officer, or member of a committee with governing board delegated powers, who, has a direct or indirect financial interest, as defined below, is an interested person.

2. Financial Interest

A person has a financial interest if the person has, directly or indirectly, through business, investment or family:

- An ownership or investment interest in any entity with which the Organization has a transaction or arrangement;
- b. A compensation arrangement with the Organization or with any entity or individual with which the Organization has a transaction or arrangement; or
- c. A potential ownership or investment interest in, or compensation arrangement with, any entity or individual with which the Organization is negotiating a transaction or arrangement.

Compensation includes direct and indirect remuneration as well as gifts or favors that are not insubstantial. A financial interest is not necessarily a conflict of interest. Under Article III, Section 2, a person who has a financial interest may have a conflict of interest only if the appropriate governing board or committee decides that a conflict of interest exists.



- b. Has read and understands the policy;
- c. Has agreed to comply with the policy; and
- d. Understands the Organization is charitable and in order to maintain its federal tax exemption it must engage primarily in <u>activities which</u> accomplish one or more of its taxexempt purposes.

Article VII

Periodic Reviews

To ensure the Organization operates in a manner consistent with charitable purposes and does not engage in activities that could jeopardize its tax-exempt status, periodic reviews shall be conducted. The periodic reviews shall, at a minimum, include the following subjects:

- a. Whether compensation arrangements and benefits are reasonable, based on competent survey information, and the result of arm's length bargaining; and
- b. Whether partnerships, joint ventures, and arrangements with management organizations conform to the Organization's written policies, are properly recorded, reflect reasonable investment or payment for goods and services, further charitable purposes and do not result in inurement, impermissible private benefit or in an excess benefit transaction.

Article VIII

Use of Outside Experts

When conducting the periodic reviews as provided for in Article VII, the Organization may, but need not, use outside advisors. If outside experts are used, their use shall not relieve the governing board of its responsibility for ensuring periodic reviews are conducted.

Effective - June 2020 and adopted by the full Board of Directors

, Secretary

Attachment 7 Leadership Job Descriptions

rooted school

Rooted School Leader

As our School Leader, you will work in step with our CEO and the leadership of Rooted School Foundation to fulfill our school-wide vision for grades 9 - 12.

Above all, you will help us determine how we will fulfill the Rooted Promise. This might not work. It might not be fun. I hope you'll do it anyway.

Fit:

- Demonstrates a passion for and commitment to Rooted's mission
- Thrives in a startup environment (mainly comfort with change and ambiguity, strong initiative)
- Must have strong organization and planning skills.
- Experience in school(s) which rely on digital curriculum as a means to develop basic content knowledge and skills preferred.
- At least three years' experience in upper middle school and/or high school with a low-income or high needs population with a track record of outstanding results
- Demonstrates a personal philosophy of high expectations for students that relies upon supportive structures, secure adult attachments, and personal responsibility
- Extensive knowledge and successful implementation of restorative practices in an upper middle school and/or high school setting with a low-income or high needs population
- Experience designing proactive measures to promote student growth and success, track record of results with a low-income or nigh needs population
- Extraordinary initiative in creation, iteration and improvement of cultural systems and structures
- Strong skill in analyzing student discipline data, coupled with a deep commitment to data-driven decision making
- Highly organized with the ability to develop organizational systems that promote efficiency and efficacy
- Committed to researching and remaining abreast of best instructional practices that may advance our mission
- Unwavering commitment to radical transparency and radical open-mindedness
- Must have strong organization and planning skills.
- Experience in school(s) which rely on digital curriculum as a means to develop basic content knowledge and skills preferred.

Direct Report:

The School Leader reports directly to the RS-CC Board of Directors, the Executive Director of the Region and the Rooted School Foundation, CEO. The School Leader will be evaluated by the RS-CC Board of Directors.

Responsibilities:

The list of responsibilities/specific duties below is not comprehensive. At the discretion of the Board Chair, Executive Director and/or CEO the specific responsibilities, actions and/or tasks may vary:

Adherence to and Execution of All Aspects of the WA Charter as Written and Approved:

- Gaining intimate knowledge of the contents of the NV Charter as approved
- Adhering to all SPCSA deadlines and timelines for data submission
- Ensuring that Rooted School Vancouver is in compliance with all WA Charter administrative regulations
- Attending all meetings with NV Charter leadership
- Participating in all school leader training modules as offered by WA Charter and WA subcontracted authorizers

Completing the Green Balloon Fellowship Modules: These include, but are not limited to:

- Mission & vision building
- Learning and implementing *"The Rooted Way"*
- Professional development
- Operational & financial excellence

Campus and Founder Shadowing and Reflection: Visiting schools across the Rooted network as well as inspiration schools in the Washington area with a focus on the following questions:

- How do I apply these strategies in my context and with my leadership?
- Where have I seen this before?
- How do I create something new in my context?

Administrative Duties:

- Developing and implementing school policies and programs aligned to the *Rooted Mission & Vision* and to the local Board of Directors
- Supervising and evaluating all faculty and staff annually
- Organizing all ceremonies and celebrations
- Designing and delivering all professional development and in-service workshops
- Leveraging expertise on specific Rooted projects and team assignments
- Designing professional development
- Applying the principles of a "Deliberately, Developmental Organization"
- Administering the setup and development of the master schedule
- Designing teacher duty schedule(s)
- Arranging and supervising all state and local assessments
- Completing reports for state and local entities, including the Board of Directors, as needed
- Providing all documentation needed for mandated programs and Board of Directors reports / presentations
- Attending all monthly Board of Directors meetings
- Assisting in the supervision of pupil activities (dances, proms, plays, etc.) which may occur in the evening or on weekends
- Arranging for class coverage(s) in case of teacher absence
- Assuming all responsibilities for attendance and school culture
- Working with special service personnel and non-school agencies on pupil academic issues
- Supporting all special education programs including annual reviews and IEP development
- Supporting all *ELL* programs including *WIDA* testing

- Meet with teachers, pupils, parents/guardians as needed
- Assist in conducting orientation for incoming students
- Coordinating and administering all teacher evaluations as required by federal and state law
- Developing formal teacher evaluations and *Professional Growth Plans* as needed
- Reviewing new textbooks, distance learning software, online programs and all curriculum
- Designing curricula aligned to state standards and local graduation requirements
- Developing all instructional scope & sequence and ensuring alignment to state standards and local graduation requirements

Management of All Board Approved Vendors & Contractors:

- Managing and providing feedback to the Board of Directors on all vendors and contractors including, but not limited to:
 - a) Rooted School Foundation
 - b) PowerSchool (or other SIS)
 - c) Board on Track
 - d) Joule Growth Partners
 - e) All food service vendors & contracts
 - f) All facilities and maintenance vendors & contracts

Human Resources:

- Maintaining an effective, positive working relationship with faculty and staff
- Investigating employee issues and conflicts and bringing them to successful resolution
- Acting as an effective role model for staff, students, parents/guardians and community members
- Providing faculty and staff coaching as needed based on teacher evaluations and state assessment outcomes
- Managing the staffing process, including recruiting, interviewing, hiring and onboarding
- Ensuring all job descriptions are up to date and compliant with all local, state and federal regulations
- Developing training materials and performance management programs to help ensure employees understand their job responsibilities
- Assisting the *Director of Operations* in developing a compensation strategy for all employees based on market research and pay surveys; keeps the strategy up to date

Other Professional Responsibilities:

- Performing other duties as assigned under authority of the Board of Education, the CEO and/or the RSF leadership
- Maintain a working knowledge of the SIS program as well as any other federal, state or local platforms.
- Holding high expectations for each student and each faculty/staff member
- Collaboratively developing and instituting universal student policies within classrooms and throughout the school campus
- Fostering positive rapport and relationships with students and other members of the school community
- Demonstrating flexibility and creatively embracing the ambiguities of building an organization focused on continuous improvement

- Serving on school committees as needed
- Collaborating with other Rooted School Leaders across the network

Professional Qualifications:

- Must have a Bachelor's Degree and/or Principal certification to be in compliance with all local and state regulations
- Must have completed three (3) years of successful teaching in grades 9 12
- Must demonstrate an ability to relate to the students, professional staff, parents/guardians and members of the community.
- A deep belief that all students, regardless of their backgrounds and educational pasts, have the potential to succeed in college and beyond and that it is the responsibility of schools to help students realize that potential
- A desire to grow as a professional
- A positive attitude and strong work ethic
- A strong knowledge of academic pedagogy, school operations and finance
- Strong analytical and project management skills, with a deep attention to detail

*Previous experience working in high-performing urban schools preferred

rooted school

Director of School Operations

The Director of Operations will be responsible for meeting goals in the following areas:

Fit:

- Demonstrates a passion for and commitment to Rooted's mission
- Thrives in a startup environment (mainly comfort with change and ambiguity, strong initiative)
- Holds advanced degree in education (Master's degree or equivalent combination of education, training, and experience sufficient to perform the essential functions of the job)
- Shows unwavering commitment to radical transparency and radical open-mindedness
- Depth of experience in managing adults as well as a track record of success in creating efficient, trusting and effective teams
- Extraordinary initiative in creation, iteration and improvement of systems and structures
- Committed to researching and remaining abreast of relevant best practices in operations and management

Human Resources:

- Manage the staffing process, including recruiting, interviewing, hiring and onboarding
- Ensure job descriptions are up to date and compliant with all local, state and federal regulations
- Develop training materials and performance management programs to help ensure employees understand their job responsibilities
- Create a compensation strategy for all employees based on market research and pay surveys; keeps the strategy up to date
- Investigate employee issues and conflicts and brings them to resolution
- Manage HR related activities, including staffing compensation, managing records, pay roll and employee relation.
- Reviews and recommends policy and procedure update in compliance with federal and state employment regulations.
- Administers various employee benefits programs including group medical/vision, dental, life and supplemental insurances
- Manage liability insurance claims
- Submit any work related injury documentation to Work Comp carrier, track injuries and OSHA 300 logs and postings
- Supports recruiting functions by screening and interviewing applicants
- Conducts new employee orientations and staff trainings as needed
- Identifying and clarifying employee issues and implementing solutions, including coaching and counseling

Maintain confidentiality for HR related issues

Facilities and Safety:

- Ensure that all classrooms and spaces are clean, safe, and reflect our core values
- Manage vendor relationships to ensure the highest quality services
- Ensure that all auxiliary staff and support staff are held accountable to the school's cultural expectations
- Ensure that school buses run on time each day and are safe
- Maintain facility daily to meet the needs of students and teachers
- Ensure that the campus is secure during the day and after hours
- Manage the campus security team

Office and Staff Support:

- Ensure that equipment (copy machines, staff computers, student computers) are always available and maintained for use by teachers and staff
- Guarantee that all requested materials and educational resources are available in a timelymanner for teachers and staff
- Establish clear procedures for staff to request material needs; hold staff accountable to thoseprocedures
- Make student information available at all times to teachers and staff
- Maintain the main office as a calm, welcoming space
- Give operations team members regularly scheduled development and hold them accountableto the cultural expectations across the school

Financial Management and Sustainability:

- Follow internal control policies as written by Rooted School
- Approve and submit invoices to Rooted School for payment
- Account for and submit cash to Rooted School for deposit
- Review and monitor school budget

Student and Family Services:

- Create a main office founded on organization and responsiveness to ensure student, parent, staff and visitor satisfaction
- Ensure that breakfast, lunch, and snack are distributed on time each day
- Ensure that the school is fully enrolled and has a waiting list equal to at least 10% of itsenrollment
- Maintain up-to-date student records, including demographic and academic information for each student

State & Local Level Compliance:

- Keep accurate enrollment files on each student
- Keep accurate attendance daily and ensure that daily attendance is 95% on average

- Complete all state reporting in a timely and accurate manner
- Collect 100% of lunch forms from students and families

Operational Leadership:

- Lead the school operations team and vendors in ensuring every detail and every part of the day is well-managed
- Coach operations staff and vendors towards excellence
- Delegate operational responsibilities across the school team

Other Professional Responsibilities:

- Hold high expectations for each student
- Collaboratively develop and institute universal student policies within classrooms and throughout the school campus
- Foster positive rapport and relationships with students
- Demonstrate flexibility and creatively embrace the ambiguities of building an organization focused in continuous improvement
- Serve on school committees as needed

Professional Qualifications:

The ideal team member would possess the following:

- Deep belief that all students, regardless of their backgrounds and educational pasts, have the potential to succeed in college and beyond and that it is the responsibility of schools to help students realize that potential
- Desire to grow as a professional and person
- Positive attitude and strong work ethic
- Strong knowledge of school operations
- Strong analytical and project management skills, with a deep attention to detail
- Previous experience working in high-performing urban schools preferred

Must have a Bachelor's Degree and/or Principal certification to be in compliance with all local and state regulations

Must have completed three (3) years of successful teaching in grades 9 - 12

Must demonstrate ability to relate to the students, professional staff, parents/guardians and members of the community.

Director of School Environment

In your role, you will be a lead architect in developing and executing our plan to sustain a healthy school environment for adults and students over the long-term.

rootedschool

Director of School Environment

- 5. Meticulously maintain, monitor, and report on student data (discipline, culture, and attendance), and provide student supports in response to data
- Collaborate with school counselor and Rooted teammates to effectively respond to student needs and implement behavior interventions with targeted students
- 7. Offer coaching and supports to school teammates in effective response to student behavior and the promotion of a positive educational environment
- 8. Ensure due process and legal compliance with all disciplinary actions, accurately document all school communication and responses to discipline
- Actively engage in creating a strong school culture. Every team member is responsible for helping establish Rooted's culture among students, partners, and the community-atlarge

COMPENSATION

Competitive salary commensurate with experience, as well as comprehensive benefits package.

TO APPLY

If you're as excited about this role as we are, email a cover letter, resume and answers to the questions in the "<u>To Apply</u>" section to work@rootedschool.org.

Attachment 8 RSF Leadership Resumes

FRANK A INCARCIOLA

CAREER PROFILE

Experienced school administrator with a proven track record of fostering and developing rigorous, relevant and positive instructional environments for students. Ability to develop and implement school/district budgets, along with effective plans to improve instruction and raise academic achievement. Noted for being able to improve school ranking, enhance test scores, reduce dropout and failure rates and better prepare students for continued learning in higher education.

AREAS OF STRENGTH AND EXPERTISE

- School Management Human Resources
- Strategic Planning & Analysis
- Educational Reform Design Scheduling and Guidance
- Evaluation and Coaching Process Implementation

2016 to Present

Fiscal Savings and Reduction

PROFESSIONAL EXPERIENCE

Rooted School

Director of Strategic Initiatives:

Grant Writing

My responsibilities include: Project management, growth and expansion planning, curriculum development and data curation, leading in the development of all mission and vision work, team building, coaching and professional development for senior leadership.

Key Accomplishments:

- Work to develop and design key infrastructure for both New Orleans and Indianapolis schools as well as the national CMO infrastructure
- Coach and thought-partner with principals on data-driven leadership
- Evaluate principals on annual performance metrics
- Design 360° evaluation / feedback tools focused on job-embedded skills and growth
- Measure and curate data for annual metrics and SPS goal attainment
- Work with the New Orleans school board to ensure state and local level compliance
- Act as the New Orleans board secretary and administrative liaison for the senior administration
- Work to communicate key progress goals and benchmarks with funders and various oversight entities including local and state boards.
- Work to develop and design charter applications for both Indianapolis, Indiana and Vancouver, Washington
- Establishing college and university networks
- Assisting in the development of the College & Career Counseling program.
- Developing and designing onboarding coursework for principals

Fairlawn School District

Superintendent of Schools:

Led and managed a comprehensive school district grades K - 12 including. Resigned position prior to full-term of contract.

Athlos Academy

Talent Recruitment & Grant Development Consultant:

- Teacher and student recruitment
- Local school board liaison
- Developing a network for teacher recruitment and human capital development
- Establishing a college and university network for entre into the Louisiana charter schools market
- Grant writing and research

2017 - 2018

2016-2017

Union County College

Humanities Department Lecturer

Instructed students in English 101, 102 and 122. Maintained regular office hours. Developed the curricula and the syllabi for the three courses.

- Development of curricula and syllabi
- Instructing English 101, 102 and 122 (Business Writing)
- Maintaining regular office hours
- Working directly with the Dean of Liberal Arts

Hamilton High School East – Steinert Memorial High School

Principal

Led and managed a comprehensive high school including: evaluating teachers and administrators, working with HR Director on a number of tasks including; succession planning, core competency building, staffing forecasting, gap analysis, negotiating strategies, goal management, recruitment/retention, and workforce diversity.

Developed a master schedule for increased instructional time and managed a zero-based budget as well as implementing the Essential Ouestions Framework and UbD (Wiggins) models for all core curricula.

Key Accomplishments:

- Increased student attendance over 96% in 2014-2015 by developing a system of meetings and phone conferences with parents
- Decreased overall suspensions by 52% by implementing a community service program both before and after school
- Enhanced four-year graduation cohort by 6% with a higher preponderance of students attending four-year colleges and fewer reporting "unpreparedness" a year later
- Reduced salary expenditure by over \$100,000 while increasing certified, site-based supervision through establishment of new administrative structure

Pequannock Township High School

2007 to 2013

2005 to 2007

Principal & Interim Asst. Superintendent

Evaluated teachers and administrators as well as implemented the Rigor & Relevance Framework (Daggett) for all core content areas. Trained administrators across the district in the Instructional Practices Inventory Protocol (Valentine) in conjunction with Danielson's Frameworks for Teaching and McRel's Teacher Evaluation System.

Key Accomplishments:

- Oversaw rise to #25 high school in the state
- Increased HSPA Language Arts & Literacy scores 143% and HSPA Mathematics scores 33% in two years
- Developed comprehensive school reform plan focusing on Wiggins' Essential Skills across curriculum and implemented Professional Learning Communities school-wide
- Implemented comprehensive PSAT/SAT/ACT improvement plan resulting in all sophomores and juniors taking the PSAT and an overall increase in SAT combined mean scores of over 100 points
- Launched district-wide book study for all administrators focusing on RTI (Hawthorne Pre-Referral Intervention Manual Fifth Edition) and resulting in a dramatic reduction in the number of students being classified

Plainfield High School Principal

Developed a safe and academically rigorous learning environment by applying proven methodologies to raise scores and general expectations for student performance. Created a strategic school plan including Corrective Action Plans designed to improve attendance, standardized test scores, and the delivery of instruction within the block. Member of the school community's Latino Action Board.

Key Accomplishments:

- Strategically implemented Smaller Learning Communities resulting in teachers having a greater voice in school governance
- Infused differentiated instruction and curriculum mapping into daily academic programs
- Identified and publicized stakeholder core values to better focus on ways to improve school climate
- Developed and established a number of action plans for administrators to streamline operations and enhance functioning in a rapidly changing educational landscape
- Chaired Accreditation for Growth Committee for Middle States and Minority Achievement Task Force for district
- Contributing experience and innovative thinking to complex problem solving

2013 to 2015

2015 to 2017

	GERTHI	CATIONS
New Jersey School Ad New Jersey Principal	lministrator/Superintendent	Louisiana Principal (Provisional) New York City Teacher of English
Languages Spoken:	English Spanish	
	ADDITIONAL	CREDENTIALS
Member of the NJI Member of Kappa	PSA Board Council Delta Pi	

Led and managed a comprehensive high school, including teacher coaching / evaluations as well as high-level budget management.

Key Accomplishments:

Principal

Asbury Park High School

- Elevated test scores on HSPT by 50%, with significantly more students scoring either proficient or advanced proficient
- Wrote and received \$1,000,000 grant for School-Based Youth Service Program
- Partnered with Catholic Charities and U.M.D.N.J. to provide free medical and mental health services to students
- Reduced number of suspensions and referrals by 30% in two years
- Implemented data-driven instruction model for school district

EDUCATION AND TRAINING

Masters in Educational Administration, Brookhyn College, Brookhyn, NY Master of Arts, English Education, Columbia University, New York, NY Bachelor of Arts, English, Fordham University, Bronx, NY

CERTIFICATIONS

Key Accomplishments:

- Supervised major renovation and construction project for school
- Instituted School-Within-a-School structure as well as Smaller Learning Communities and Advisory Programs
- Addressed needs of skills-fragile students through the establishment of an alternative school, James Kimpel Alternative School
- Increased SAT combined mean scores by creating pilot prep courses and a series of on-line tutorials in conjunction with Peterson's Test Prep
- Achieved top 75 schools in New Jersey recognition for first time during tenure

Led and managed a comprehensive high sche

level budgeting. Supervised the construction

2001 to 2004

1999 to 2001

cher coaching, staff and faculty evaluations, high-0,000 square feet of instructional space.

Jonathan M. Johnson

Chapman University: Orange, California June 2010 Bachelor of Arts in Religious Studies, Minor in History Chancellor's List, Dean's Scholar, Thurgood Scholar, Phi Alpha Theta History Honors Society

PROFESSIONAL WORK EXPERIENCE

Rooted School: New Orleans, Louisiana

Founder and CEO

- · Outperformed average district performance in ELA and Math during Rooted's first two years
- Rooted School Juniors (the latest class) have made 5.6 years in Lexile growth within 2.5 years
- Over 70% of students are on track to earn 4 or more industry-recognized credentials in the tech sector

September 2014-Present

July 2010-August 2014

- Raised more than \$4.5M through grants and private donations
- Built the organization to 21 staff members currently serving 165 students
- · Secured over 30 technology sector partnerships that span Indianapolis and Louisiana
- Wrote and obtained charter approvals by New Orleans Public Schools and the Office of Education in Indianapolis
- Featured in media outlets that includes: NPR, Fast Company, Forbes, NewsOne, Hechinger Report, Times-Picayune, Indianapolis Business Journal
- Featured as keynote speaker and panelist at events that include: The Giving Pledge, Chapman University commencement, Michigan State University, TFA's 25th Anniversary, Georgia Governor's Office of Student Achievement Innovation Summit, Bush Foundation Personalized Learning Journey, SXSWEDU, WA Charters Annual Conference, TFA's—Policy, Advocacy, 4.0 Schools Community Summit, and more.
- Received Louisiana's Association of Public Charter Schools' Innovative Education Award (2017-2018)
- Awarded Distinguished School by the Orleans Parish School Board (2017 2018)
- Recognized as 1 of 235 most innovative schools in the U.S. with a focus on student-centered learning
- Awarded earliest investment in Charter School Growth Fund history for multi-state expansion

8th Grade Social Studies Teacher 83% student passage rate on 8th grade social studies LEAP test in 2012–2013 academic year while the district average was 57%.

Awarded Finalist for the Fishman Prize by fourth year of teaching.

KIPP Central City Academy: New Orleans, Louisiana

SAMPLE HONORS

Rising Star Award, School Leader of Color National Advisory Board, Teach For America	Winter '20
Workforce Leadership Academy, Aspen Institute + New Orleans Business Alliance	Spring - Winter 19
Charter School Growth Fund, Emerging CMO	Fall 19
2018 Millennial Award–Education	July 18
40 under 40, Gambit Weekly	Fall '17
2017 Gathering of Leaders Millennial Impact Fellow, New Profit	Spring '17
Advisory Board Member, SXSWEDU 2017	Summer 18

1 of 2

Jonathan M. Johnson

Winner, NewSchools Venture Fund Catapult: Invent and Launch 2016	Winter 15
Winner, Echoing Green Global Fellowship	Summer 15
Winner, Teach For America Social Innovation Award	Summer 15
Winner, Camelback Ventures Fellowship	Spring '15
Winner of Future of School Challenge, New Schools for New Orleans and 4.0 Schools	Spring '14
Finalist, Fisherman Prize for Superlative Classroom Practice	Spring '14
KIPP School Leadership Program Fellow	Summer '13-Spring '14
Leaders For Educational Equity School Board Fellow (OPSB)	Spring '12
150 Faces of Chapman University Award, Chapman University	Fall '11

COMMUNITY INVOLVEMENT

Alumni Advisory Board, Teach For America—GNO	Spring '19 - Fall '19
The Collective Board, Teach For America—GNO	Summer 14-16
Deita Tau Deita International Fraternity	Fall '06-Lifetime

REFERENCES

Kaitlin A.T. Karpinski

EDUCATION	
Master of Education in Special Education, Mild/Moderate Disabilities	May 2010
University of Hawai'i at Manoa, Honolulu, Hawai'i Cumulative GPA: 3.85	
Bachelor of Arts in Musical Theatre	May 2008
Wilkes University, Wilkes-Barre, Pennsylvania	May 2008
Cumulative GPA: 3.89	
Alumni Award for Leadership	May 2008
EXPERIENCE	
Gary Lighthouse College Prep Academy	July 2013- present
Served as Director of Teacher Leadership in Mathematics (2013-14), Assistant Prin	
Grade Academy and Interim Principal of 9-12 (2015-16), and Principal (2016-17) of	f an 8 th -12 th grade charter schoo
 Led students, teachers, and school leaders to achieve significant academic gains 	
- As a Director of Teacher Leadership of the Mathematics Department, led a team of 7	
Course Exam pass/pass+ proficiency from 48% to 72% (2013-2014)	
 As Assistant Principal, collaborated in leading the change that increased senior gradu: 15), and as Principal, led a staff of 55 to improve graduation rate from 92.4% to 98% (2 	015-16)
 As Principal of 8th grade Academy, led a team of 8 teachers to achieve an average of 1 amongst 8th grade scholars (2015-16) 	
 As Principal of 8th grade Academy, led students and teachers to achieve an average of to an average of 2.68 years of growth in reading (2015-16) As Principal of 8th and a Academy doubled methods by ISTER and Friends in Mathematical States 	
- As Principal of 8 th grade Academy, doubled mathematics ISTEP proficiency in Mathem 2014-15 to 2015-16	natics in the 8" grade academy fro
 Increased school accountability letter grade from F to C from 2013-14 to 2015-16. Effectively engaged teachers and leaders in professional development, instruction 	onal coaching, and data analysi
and led implementation of best practices in intervention.	
 Provided active, effective, and research-based instructional coaching to the mathema 2016-17), 8th grade team (14-15, 15-16), and leadership teams (2014-2017) Created, designed, and facilitated a 10-day beginning of year professional developme 	
three consecutive years	
 Designed and facilitated ongoing professional development in intervention, gradual n like a Champion instructional strategies, Lee Cantor's Behavior Management Cycle, Lev 	
of a Team, and research-based instructional initiatives	-
 Possesses deep knowledge of curriculum and implementation best practices of Histor Engage New York: Eureka Math, Achieve3000, Dreambox Demonstrated fluency in executing and training educators in technological programs: 	
 Demonstrated nuency in executing and training educators in technological programs. PowerTeacherPro, Achieve3000, Dreambox, eSIS, ECSSS, Linkit, Learning Station, Garage 	
 Fluent in accurately analyzing data to determine strategic action steps in closing - Proficient in analyzing NWEA, Acuity, Algebra I and English 10 End of Course Exams, IS report card data 	gaps in student achievement.
 Provided professional development in data analysis through Data Digs, data cycles, ar 	nd instructional coaching
- Created data-driven professional development to address student growth and teacher	er development needs
 Collaborated in implementing a Restorative Practice vision and model to suppor grade students. 	
- Decreased total suspension days from 1,039 in 2013-14 to 136 in 2015-16	
 Utilized PBIS strategies in classroom, grade level, and whole-school initiatives, trained Collaborated in creating Tier II and III settings for students with moderate to severe b 	2
 Led a team to exceed enrollment goals in 2015-16, resulting in 102% enrollment 	t reported to the state of Indiar

Kaitlin A.T. Karpinski

Waipahu High School, Waipahu HI

July 2008- June 2013

Served as a Hawai`i State Licensed Special Educator, Highly Qualified Teacher in English and Mathematics, and Teach For America Hawai`i Corps Member ('08-'10)

 Acted urgently on behalf of students to close academic gaps, provide excellent data-driven instruction, build lasting student and staff relationships, and contribute to the school and professional community.

- In school year 2011-12 led 150 students to achieve an average of 4.2 years computational mathematics growth, as measured by the Stanford Diagnostic Mathematics Test (blue edition)

 Led small learning community to achievement gains in 2009-10 and 2010-11: students achieved cumulative mastery averages of 80% or higher on English, Mathematics (88.4%), and Science prioritized standards and benchmarks

 Led students to achieve significant gains in 2008-2009 with a class average increase of 1.5 years of reading growth, and 83% mathematics mastery of prioritized standards and benchmarks

 Developed and implemented active, engaging, research-based, and rigorous mathematics curriculum for Algebra I and Directed Studies in Mathematics, and Geometry

 Inspired students to reach their highest potential through use of innovative teaching strategies such as integration of technology, movement, modeling, and chanting

- Analyzed student data and created action plans to address gaps in student understandings

 Co-Designed and led the Ohana of Excellence small learning community, a learning program that emphasizes an inclusive learning environment for students receiving special education services; project-based learning; skills for workplace and career readiness; community-based instruction; social skills integration; and self-advocacy skills. This model is still an active program at Waipahu High School.

 Participated in rigorous professional development opportunities in the field of education, including but not limited to Stanford Diagnostic Reading Test/Reading strategies, ECSSS Special Education, Crisis Prevention Intervention, Quantum Learning strategies, data collection and analysis, and Protect Kaho`olawe Ohana's curriculum training held on the island of Kaho`olawe

- Wrote and received over \$1,500 in donorschoose.org grants for technology and classroom supplies

- Selected to be a Sue Lehmann Excellence in Teaching Award Hawai'i Quarter-Finalist as a second-year corps member

 Advocated, facilitated, and instructed as an Individualized Education Plan Care Coordinator and Special Education teacher.

Facilitated annual and triennial evaluation Individualized Education Plan meetings with students, parents, service
providers, administrators, and general education teachers

- Created, assessed and monitored mathematics Individualized Education Plan goals and objectives for 99 students.

 Constructed and monitored academic, behavioral, and social interventions for individual students, with an emphasis on self-monitoring strategies

 - Co-facilitated and designed a differentiation workshop for 20 English teachers, providing instructional strategies for students receiving special education services in an inclusion setting

 Volunteered and actively engaged in programs that supported students, teachers, and school and local communities.

- Served on the Na`au Pono committee, a committee dedicated to introducing, upholding, and rewarding behavioral expectations for Waipahu High School students.

- Co-advised 8 officers and 90 members of Waipahu High School's Interact club, a club sponsored by Rotary Club of West Pearl Harbor, founded to provide service to local, national, and global communities

 Facilitated 3-day leadership camps (Rotary Youth Leadership Awards—RYLA) for 60+ students through Rotary International.

 Guest presenter at Professional Saturday events with Teach For America; Instructed beginning teachers in Differentiated Instruction, Data Collection and Student Investment, Fully Self Contained Inclusive Instruction, and Fully Self-Contained Best Practices

Kaitlin A.T. Karninski

- Served on TFA Student Achievement Picnic committee, ensuring /D students and their respective teachers celebrated significant student achievement with food, games and activities, entertainment, and prizes

- Volunteered in the TFA Hawai'i corps Sponsor A Teacher program, communicating formally and informally with donors through letters and Sponsor A Teacher events

 Communicated professionally with TFA donors, founders, corps members and alumni, including a formal speech at the annual First Hawaiian Bank Funder event

Teach For America Summer Institute, Philadelphia PA

May-August 2011

Summer 2007

- Coached new teachers as a Corps Member Advisor during a six-week summer training program

 Coached, supported, and managed 14 corps members (beginning teachers) as they instructed secondary
- students in Algebra I and Geometry during summer school.
- Ensured students in corps members' classrooms received a rigorous, supportive, high-quality summer school experience
- Observed corps members' classroom teaching, providing feedback and coaching aligned with the Teaching As
- Leadership framework through weekly debrief conversations
- Led group learning experiences (lesson planning clinics, management/investment clinics) for corps members while
- building a strong team culture and providing targeted, individualized support
- Analyzed student performance data with corps members, directing changes in instructional design and implementation that increased formative student mastery averages by 20%
- Analyzed 70 lesson plans per week, providing individual feedback and coaching to each corps member
- Collaborated with members of the school team and staff at summer institute to analyze student achievement and corps member survey data, and determine prioritized action steps in meeting student and corps member needs.

Wilkes University, Wilkes-Barre PA

Served as Orientation Coordinator for Freshman Orientation

- Supervised 62 E-Mentors/ Orientation Leaders over the course of freshman orientation, and two orientation
 resident assistants as they prepared the residence halls and created room assignments.
 - Designated E-Mentors/Orientation Leaders to specific roles over the course of each two-day orientation, resulting in extremely positive feedback from supervisory staff and E-Mentors/Orientation Leaders.
 - Instructed E-Mentors/Orientation Leaders on the expectations of their roles and assignments.
- Coordinated many aspects of freshman orientation, including (but not limited to) the creation of the orientation theme, reservation of buildings/rooms on campus, E-mentors/Orientation Leaders participation in welcoming event, and a variety of social activities.
 - Prepared parents and students for orientation through mailings, website, email, and phone correspondence
 - Collaborated directly with University College, Career Services, Wilkes University faculty advisors, Community Service office, and Campus Security to coordinate orientation events

Jewish Community Center Day Camp Ropes Course Specialist	Summers, 2005-2006
Provided low ropes course programming for 3-7 year old children and low/high ropes course	rse programming for 8-17 year old
children and children with exceptionalities.	
Universal Ropes Course Builders Certified Facilitator/Trainer	2006-2008

· Conducted trainings to certify participants in low ropes course, high ropes course, and climbing wall facilitation.

MEMBERSHIP

Wilkes University Alternative Spring Break Participant for Belize, South America 2007-2008

 Kaitlin A T	Kaminaki	

Coordinator for New Orle Alpha Chi Mu Honor Society

2007-present

Honor Society of Leadership and Success 2007-present

SKILLS AND INTERESTS

Technology: Microsoft Office proficient (Word, PowerPoint, Excel, Outlook) · iWork (pages, keynote) and iLife (iPhoto, iMovie, Garageband, and iWeb) proficient · Smartboard proficient · Language: Sign Language (basic) · Interests: Traveling, community service, singing

SHERAHANN LEROFUE

PROFESSIONAL EXPERIENCE

Ed Ops Finance Specialist

New Orleans, LA Spring 2020 to present

Baton Rouge, LA

Newark, NJ

Newark, NI

Summer 2017 to Spring 2020

Summer 2013 to Summer 2017

Summer 2012 to Summer 2013

- Provide full cycle accounting management as an outsourced CFO for several New Orleans are charter schools, including A/P, payroll, grant management, accounts reconciliation and monthly close.
- Review financial transactions and conduct an internal audit on a monthly and quarterly basis to ensure compliance with Government Accounting Standards and GAAP
- Prepare monthly financial statements and presentations for schools and assist with the budget planning process
- Assist schools with periodic reporting, financial audits, retirement plan audits and fiscal monitoring
- Analyze, model, and solve problems for schools on a wide range of business issues

Collegiate Academies - Collegiate Baton Rouge

Founding Director of Finance & Operations

- Managed finance and operations of a growing high school (At scale plan: 600 students)
- Managed school operations team (Ope Coordinator, Manager of Data & Operations, School Nurse and Custodian)
- Met enrollment goals for incoming cohort by Year 2 of at-scale plan
- Managed launch of school in 2017 in addition to two facility moves during new building construction

Uncommon Schools - North Star Academy Clinton Hill Middle School Director of Operations

- Managed finance and operations of a full-scale middle school with 350+ students and 40+ staff members
- Oversaw student enrollment and orientation process
- Managed school operations team (Office Manager, Special Projects Coordinator, School Nurse and Custodian)
- Oversaw day-to-day operations with ancillary service providers (food service, custodial, technology, etc.)
- Oversaw accounting processes of the school, including payroll, purchasing, receivables, payables, etc.
- Served as School Testing Coordinator for PARCC and NJASK

100 Legacy Academy Middle School

Founding Director of Operations

- Performed day-to-day accounting processes of the school, including payroll, purchasing, receivables, payables, etc.
- Oversaw student enrollment and recruitment process
- Worked with the School Business Administrator to prepare board meeting packets
- Oversee day-to-day operations with ancillary service providers (food service, transportation, custodial, etc.)
- Act as the NJSMART School Data Manager for student, personnel and special education state reporting
- Write policy manuals including the Financial Policy and Procedures Manual, Employee Handbook, School Safety Plan, etc.

Morris Jeff Community School Founding Director of Finance& Operations

New Orleans, LA

Summer 2010 to Summer 2012

- Performed day-to-day accounting processes of the school, including payroll, purchasing, receivables, payables, etc.
- Prepared fiscal and programmatic reports for finance committee members, board of directors and LA Department of Education
- Manage fiscal and programmatic requirements for federal and state grants received: Title I, Title II, IDEA, LA4, Edujobs, etc.
- Oversaw day-to-day operations with ancillary service providers (food service, transportation, custodial, etc.)
- Handled internal, state, and federal audits and IRS 990 filing requirements
- Wrote policy manuals including the Financial Policy and Procedures Manual, Employee handbook, Emergency Plan, etc.
- Successfully negotiated contracts with ancillary service providers to reduce costs up to 25% post-budget cut

Rebowe & Company, CPAs

Staff Accountant

Metairie, LA Spring 2008 to Summer 2010

Spring 2007 to Spring 2008

- Audit niche groupe include government entitiee, non-profit organizatione and charter schoole
- Specialization in federal grant audits for OMB A-133 compliance, particularly in areas of education and housing
- Responsible for preparing federal and state tax returns for Forms 1040, 990 and 1065 AuditDepartmentIntern
- Performed basic audit procedures for audits of local governmental agencies, charter schools, and non-profit organizations

EDUCATION

Loyola University New Orleans Bachelor of Accountancy (135 credit hours) University of New Orleans Post Undergraduate courses (9 credit hours) New Orleane, LA Spring 2008 New Orleane, LA Fall 2009

PROFESSIONAL ASSOCIATIONS

- Louisiana Association of School Business Officials
- Southeastern Association of School Business Officials
- Louisiana Association of School Administrators of Federally Assisted Programs
- Committee for a Better New Orleans, Board Member and Bryan Bell Metropolitan Leadership Forum Participant
- Cape for Kide, member of the board advisory committee
- Association of School Business Officials International, recipient of the Met Life Bridges to the Future scholarship
- American Society of Women Accountanta, co-chair of the communications and website committee, won national "Best Website" award
- Alpha Kappa Pai, Business Fraternity
 - o Served as Chapter President and Vice President of student chapter at Loyola University
 - o Served as Alumni Volunteer Chapter Advisor to Tulane University Chapter

Attachment 9 NOT APPLICABLE

Attachment 10 School Leader Evaluation

I. PROFESSIONAL STANDARDS FOREDUCATIONAL LEADERS

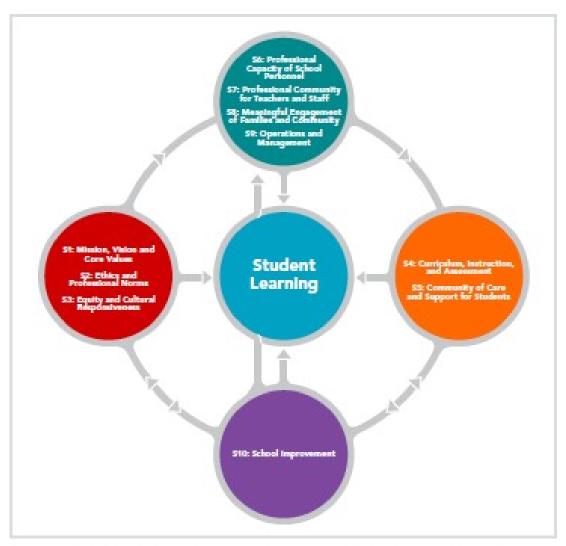


Figure 1: Relationship of School Leadership Work to Student Learning

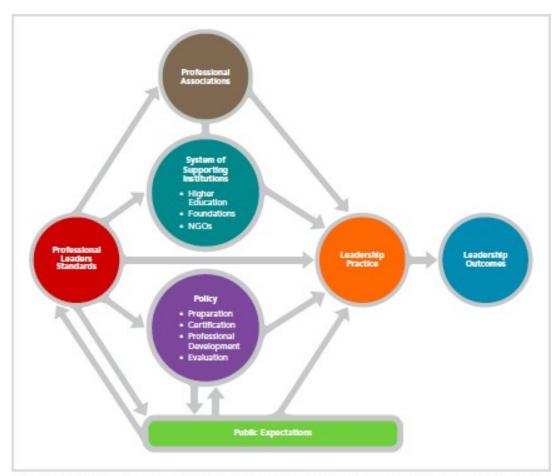


Figure 2: Theory-of-Action of the Role of Professional Standards in Leadership Practice and Outcomes

Professional Standards for Educational Leaders 2015

STANDARD 1. MISSION, VISION, AND CORE VALUES

Effective educational leaders develop, advocate, and enact a shared mission, vision, and core values of high-quality education and academic success and well-being of *each* student.

- Develop an educational mission for the school to promote the academic success and well-being of each student.
- b) In collaboration with members of the school and the community and using relevant data, develop and promote a vision for the school on the successful learning and development of each child and on instructional and organizational practices that promote such success.
- C) Articulate, advocate, and cultivate core values that define the school's culture and stress the imperative of child-centered education; high expectations and student support; equity, inclusiveness, and social justice; openness, caring, and trust; and continuous improvement.
- d) Strategically develop, implement, and evaluate actions to achieve the vision for the school.
- e) Review the school's mission and vision and adjust them to changing expectations and opportunities for the school, and changing needs and situations of students.
- Develop shared understanding of and commitment to mission, vision, and core values within the school and the community.
- g) Model and pursue the school's mission, vision, and core values in all aspects of leadership.

STANDARD 2. ETHICS AND PROFESSIONAL NORMS

Effective educational leaders act ethically and according to professional norms to promote *each* student's academic success and well-being.

- a) Act ethically and professionally in personal conduct, relationships with others, decisionmaking, stewardship of the school's resources, and all aspects of school leadership.
- b) Act according to and promote the professional norms of integrity, fairness, transparency, trust, collaboration, perseverance, learning, and continuous improvement.
- C) Place children at the center of education and accept responsibility for each student's academic success and well-being.
- Safeguard and promote the values of democracy, individual freedom and responsibility, equity, social justice, community, and diversity.
- e) Lead with interpersonal and communication skill, social-emotional insight, and understanding of all students' and staff members' backgrounds and cultures.
- Provide moral direction for the school and promote ethical and professional behavior among faculty and staff.

STANDARD 3. EQUITY AND CULTURAL RESPONSIVENESS

Effective educational leaders strive for equity of educational opportunity and culturally responsive practices to promote *each* student's academic success and well-being.

- Ensure that each student is treated fairly, respectfully, and with an understanding of each student's culture and context.
- Recognize, respect, and employ each student's strengths, diversity, and culture as assets for teaching and learning.
- c) Ensure that each student has equitable access to effective teachers, learning opportunities, academic and social support, and other resources necessary for success.
- Develop student policies and address student misconduct in a positive, fair, and unbiased manner.
- e) Confront and alter institutional biases of student marginalization, deficit-based schooling, and low expectations associated with race, class, culture and language, gender and sexual orientation, and disability or special status.
- Promote the preparation of students to live productively in and contribute to the diverse cultural contexts of a global society.
- g) Act with cultural competence and responsiveness in their interactions, decision making, and practice.
- Address matters of equity and cultural responsiveness in all aspects of leadership.

STANDARD 4. CURRICULUM, INSTRUCTION, AND ASSESSMENT

Effective educational leaders develop and support intellectually rigorous and coherent systems of curriculum, instruction, and assessment to promote *each* student's academic success and well-being.

- a) Implement coherent systems of curriculum, instruction, and assessment that promote the mission, vision, and core values of the school, embody high expectations for student learning, align with academic standards, and are culturally responsive.
- b) Align and focus systems of curriculum, instruction, and assessment within and across grade levels to promote student academic success, love of learning, the identities and habits of learners, and healthy sense of self.
- c) Promote instructional practice that is consistent with knowledge of child learning and development, effective pedagogy, and the needs of each student.
- Ensure instructional practice that is intellectually challenging, authentic to student experiences, recognizes student strengths, and is differentiated and personalized.
- e) Promote the effective use of technology in the service of teaching and learning.
- Employ valid assessments that are consistent with knowledge of child learning and development and technical standards of measurement.
- g) Use assessment data appropriately and within technical limitations to monitor student progress and improve instruction.

STANDARD 5. COMMUNITY OF CARE AND SUPPORT FOR STUDENTS

Effective educational leaders cultivate an inclusive, caring, and supportive school community that promotes the academic success and well-being of each student.

- a) Build and maintain a safe, caring, and healthy school environment that meets that the academic, social, emotional, and physical needs of each student.
- b) Create and sustain a school environment in which each student is known, accepted and valued, trusted and respected, cared for, and encouraged to be an active and responsible member of the school community.
- C) Provide coherent systems of academic and social supports, services, extracurricular activities, and accommodations to meet the range of learning needs of each student.
- d) Promote adult-student, student-peer, and school-community relationships that value and support academic learning and positive social and emotional development.
- e) Cultivate and reinforce student engagement in school and positive student conduct.
- Infuse the school's learning environment with the cultures and languages of the school's community.

STANDARD 6. PROFESSIONAL CAPACITY OF SCHOOL PERSONNEL

Effective educational leaders develop the professional capacity and practice of school personnel to promote each student's academic success and well-being.

- a) Recruit, hire, support, develop, and retain effective and caring teachers and other professional staff and form them into an educationally effective faculty.
- b) Plan for and manage staff turnover and succession, providing opportunities for effective induction and mentoring of new personnel.
- C) Develop teachers' and staff members' professional knowledge, skills, and practice through differentiated opportunities for learning and growth, guided by understanding of professional and adult learning and development.
- Foster continuous improvement of individual and collective instructional capacity to achieve outcomes envisioned for each student.
- e) Deliver actionable feedback about instruction and other professional practice through valid, research-anchored systems of supervision and evaluation to support the development of teachers' and staff members' knowledge, skills, and practice.
- Empower and motivate teachers and staff to the highest levels of professional practice and to continuous learning and improvement.
- g) Develop the capacity, opportunities, and support for teacher leadership and leadership from other members of the school community.
- Promote the personal and professional health, well-being, and work-life balance of faculty and staff.
- Tend to their own learning and effectiveness through reflection, study, and improvement, maintaining a healthy work-life balance.

STANDARD 7. PROFESSIONAL COMMUNITY FOR TEACHERS AND STAFF

Effective educational leaders foster a professional community of teachers and other professional staff to promote each student's academic success and well-being.

- a) Develop workplace conditions for teachers and other professional staff that promote effective professional development, practice, and student learning.
- b) Empower and entrust teachers and staff with collective responsibility for meeting the academic, social, emotional, and physical needs of each student, pursuant to the mission, vision, and core values of the school.
- C) Establish and sustain a professional culture of engagement and commitment to shared vision, goals, and objectives pertaining to the education of the whole child; high expectations for professional work; ethical and equitable practice; trust and open communication; collaboration, collective efficacy, and continuous individual and organizational learning and improvement.
- d) Promote mutual accountability among teachers and other professional staff for each student's success and the effectiveness of the school as a whole.
- e) Develop and support open, productive, caring, and trusting working relationships among leaders, faculty, and staff to promote professional capacity and the improvement of practice.
- Design and implement job-embedded and other opportunities for professional learning collaboratively with faculty and staff.
- Provide opportunities for collaborative examination of practice, collegial feedback, and collective learning.
- Encourage faculty-initiated improvement of programs and practices.

Effective educational leaders engage families and the community in meaningful, reciprocal, and mutually beneficial ways to promote each student's academic success and well-being.

- Are approachable, accessible, and welcoming to families and members of the community.
- b) Create and sustain positive, collaborative, and productive relationships with families and the community for the benefit of students.
- C) Engage in regular and open two-way communication with families and the community about the school, students, needs, problems, and accomplishments.
- d) Maintain a presence in the community to understand its strengths and needs, develop productive relationships, and engage its resources for the school.
- e) Create means for the school community to partner with families to support student learning in and out of school.
- Understand, value, and employ the community's cultural, social, intellectual, and political resources to promote student learning and school improvement.
- g) Develop and provide the school as a resource for families and the community.
- h) Advocate for the school and district, and for the Importance of education and student needs and priorities to families and the community.
- Advocate publicly for the needs and priorities of students, families, and the community.
- Build and sustain productive partnerships with public and private sectors to promote school improvement and student learning.

II. LEADERSHIP PRACTICES INVENTORY

Make the Most of Your LPI Feedback

This probably doesn't come as any surprise to you, but there's no such thing as instant leadership—or instant expertise of any kind. Those who are the very best at anything become that because they had a strong desire to excel, a belief that new skills and abilities can be learned, and a willing devotion to deliberate practice and continuous learning. What truly differentiates the expert performers from the good performers is hours of practice. Deliberate practice. The best leaders work at becoming the best, and it doesn't happen over a weekend.

Those who are the best at leading are also the best at learning. Exemplary leaders don't rest on their laurels or rely on their natural talents; instead, they continually do more to improve themselves. So if you want to be the best you can be, you need to become a great learner.

Here are some tips on how you can get the most learning out of the LPI process:

- Accept the feedback as a gift. Feedback may not come wrapped in a
 package with a bow, but it's still one of the most valuable gifts you'll
 ever receive. Why? Because we know from our research that leaders
 who are the most open to feedback are far more effective than leaders
 who resist hearing other people's perspectives on their behaviors.
- Take the feedback seriously. You might wonder, "Will it really make a difference if I increase the frequency of the behaviors measured by the LPI?" It will. Research consistently shows the same results: The more frequently you demonstrate the behaviors included in the LPI, the more likely you will be seen as an effective leader.
- Value the difference in your observers' perspectives. You're a multidimensional person, and your feedback ought to be multi-dimensional as well. You work with people from a variety of backgrounds and from a variety of functions and organizations. Feedback from these multiple perspectives helps you see how you lead across groups and situations. The feedback from each observer helps you build a more complete picture of how effective you are a leader.
- Plan now to retake the LPI. Great leaders continually set goals and seek feedback. The LPI gives you a snapshot in time. It is a beginning point from which to move forward. To heighten your focus and practice with great purpose, decide now that you will retake the instrument within a specific period of time—we recommend between six and nine months—to see how you are doing and identify new priorities for your practice.

Why You Can Trust the Feedback

When we developed the LPI, we conducted several tests to ensure that the instrument had sound psychometric properties. Our own, as well as independent studies, consistently confirm that the LPI has very strong reliability and validity. Reliability means that the six statement pertaining to each leadership practice are highly correlated with one another.

Test/re-test is also high. This means that scores from one administration of the LPI to another within a short time span (a few days or even months) and without any significant intervening event (such as a leadership training program) are consistent and stable.

The LPI has both face validity and predictive validity. "Face validity" means that the results make sense to people. "Predictive validity" means that the results are significantly correlated with various performance measures and can be used to make predictions about leadership effectiveness.

The Ten Commitments of Exemplary Leadership

MODEL THE WAY

- Clarify values by finding your voice and affirming shared values.
- Set the example by aligning actions with shared values.

INSPIRE A SHARED VISION

- Envision the future by imagining exciting and ennobling possibilities.
- Enlist others in a common vision by appealing to shared aspirations.

CHALLENGE THE PROCESS

- Search for opportunities by seizing the initiative and by looking outward for innovative ways to improve.
- Experiment and take risks by consistently generating small wins and learning from experience.

ENABLE OTHERS TO ACT

- Foster collaboration by building trust and facilitating relationships.
- Strengthen others by increasing self-determination and developing competence.

ENCOURAGE THE HEART

- Recognize contributions by showing appreciation for individual excellence.
- Celebrate values and victories by creating a spirit of community.

First Impressions

KEEP IN MIND WHEN REVIEWING YOUR LPI REPORT:

- There is no such thing as a "bad" score, or even a "good" score. The LPI scores are a snapshot—an objective, current view of your leadership behaviors. They are not "grades" but opportunities for you to become more comfortable and skillful as a leader.
- Look for messages in the data, not scores. You may be receiving feedback from your manager, your direct reports, your peers, and others with whom you interact. It's easy to get lost in all the numbers. But don't let the data overwhelm you. Ask yourself, "What are people trying to tell me about my leadership behaviors?" "Where do I see consistencies and inconsistencies?" "Where are the patterns that shape how others see my leadership?" Treat the LPI feedback not as a report card, but as valid and useful information that you can use to become a better leader.
- Take personal ownership of the scores instead of thinking up excuses for your observers' ratings. Remember that the purpose of this assessment is to identify what you can do to become a better leader.
- Remember that the observers are referred to by letters and numbers instead of by name so they remain anonymous. Do not waste your time attempting to figure out who D1 or C3 might be. It does not matter, and you are likely to be incorrect anyway. Instead, concentrate on the messages.
- Do not be surprised if one observer rates you significantly lower in most if not all of the practices. You do not interact with everyone equally; the lower rating usually indicates that that observer does not see you engaging in the practice behaviors very frequently. You might have to think about and create new ways to ensure your leadership is more visible.

Exploring Consistency

Consistency in behavior is important to your credibility. It lets others know that they can count on you to be consistent in your actions so they know what to expect from you.

In the ideal scenario, your Self ratings would be very consistent with your Observer ratings. But in the real world, scores are not always consistent.

There are a number of valid explanations for inconsistency in your feedback. For instance, some people know you better, people in various roles (or varying functions) having differing expectations of you, and you may behave differently with some people than with others. What's important is to understand why people rate you differently than you rate yourself and think about the extent to which you need to be consistent.

Look through your feedback report quickly, paying special attention to the Data Summary pages for each of The Five Practices. Think about the questions on this page. Record your thoughts on note paper as needed.

COMPARE YOUR SELF RATINGS TO YOUR OBSERVER RATINGS

- How consistent are your self ratings with those of your observers? In other words, do you rate yourself higher than, lower than, or about the same as others rate you?
- Where are the self and observer ratings the most consistent?

COMPARE THE OBSERVERS' RATINGS WITH ONE ANOTHER

- How consistent are your observer ratings with one another? Do they tend to see your behavior in similar ways or not?
- Where are your observer ratings the most consistent with one another?

THINK ABOUT POSSIBLE REASONS FOR INCONSISTENCIES

- Where are your self ratings the most inconsistent with your observer ratings?
- Where are your observer ratings most inconsistent with one another?
- What might be some reasons for the inconsistencies?

TURN TO THE PERCENTILE RANKING PAGE

The Percentile Ranking page of your LPI Feedback Report shows how your self and observer scores compare with a large sample of observer ratings for leaders who have also taken the LPI.

Fill out the chart below by placing a check mark in the appropriate spaces for corresponding rater type, response, and percentile ranking. Then answer the questions that follow.

Percentile	Model the Way	Inspire a Shared Vision	Challenge the Process	Enable Others to Act	Encourage the Heart
Below 30th					
Self					
Manager					
Direct Report					
Co-Worker					
Other					
30th-70th					
Self					
Manager					
Direct Report					
Co-Worker					
Other					
70th-100th					
Self					
Manager					
Direct Report					
Co-Worker					
Other					

Focus Your Developmental Efforts

If you want to be a leader, you have to pay attention to those leadership behaviors that seem most comfortable for you and those you don't engage in as frequently.

Take it one step at a time. Small wins create momentum for change.

According to researchers, what truly differentiates the great from the merely good or average, regardless of their fields, is hours and hours of practice in order to obtain mastery in their fields and endeavors.

It is only through deliberate practice—focused, planned learning activities designed to improve a specific aspect of performance and usually guided by a trainer or coach—that you can develop your leadership capacity. That is true whether you want to improve your strengths—the skills you already have—or strengthen your weak behaviors.

To use your LPI feedback to improve, follow these steps:

- Use your LPI feedback to identify your priorities for improvement and set specific goals.
- 2. Make a plan to achieve your goals.
- 3. Go public with your plan.
- 4. Obtain feedback and support.

Identify Your Priorities

Take another look at the Leadership Behaviors Ranking page in your LPI Feedback Report. Where would you like to focus your developmental efforts?

Behaviors to keep practicing:

2. Behaviors to strengthen:

Those who perform at the highest levels believe that, no matter how good they are, they can always be better. Less is not more when it comes to learning. More is more.

Circle one behavior to maintain a current rate of frequency and one behavior to practice more frequently as your top priorities at this time. Then review the sample Leadership Development Worksheet on the following pages and fill out a Leadership Development Worksheet to set your goals for the next learning project and come up with a plan for achieving them.

When you achieve your goals, you can choose two more priorities and repeat the process.

In addition to practice, you need good coaching, and The Five Practices of Exemplary Leadership provides a coaching framework. But remember that improvement begins by first acknowledging that you can be a better leader than you are today and that you want to put forth the effort to achieve that. No amount of coaching or practice can force you to improve. The motivation comes from within. But here's something we know from our research: The best leaders are the best learners.

Sample Leadership Development Worksheet

TODAY'S DATE: May 1, 2017

LEADERSHIP DEVELOPMENT PERIOD: May 2-22, 2017

MY TWO TOP PRIORITIES FOR THIS PERIOD: Write a compelling vision statement and present it to my team.

- A LEADERSHIP BEHAVIOR TO KEEP PRACTICING: Model the Way: Continue asking for feedback from team members on how my actions affect their performance.
- A LEADERSHIP BEHAVIOR TO STRENGTHEN: Inspire a Shared Vision: Describe a compelling image of the future and enlist team members in that common vision.

MY GOALS (WHAT I WANT TO ACHIEVE): Write and present a compelling vision of the future that my team shares.

THE BENEFITS OF ACHIEVING THESE GOALS: We will be energized and enthusiastic about working together toward our common goal; we will be more productive; we will be better able to achieve our team's mission

(Continued)

What's Next

When people offer feedback, they'd like to know that you value this gift and that you intend to do something with it. Plan a conversation (or conversations) with your observers in which you do the following:

- Thank your observers for their feedback.
- Acknowledge what messages you heard and ask for any necessary clarification.
- Tell observers what you are going to do and the benefits you expect.
- Ask for their continuing feedback and support.

It's up to you whether to meet with observers as a group or one-on-one. Here are some suggestions for holding productive conversations:

- Think ahead of time about what you want to say and what you would like from the observers.
- Be honest about the feedback you received and how you felt about it. By expressing your feelings, you will more easily establish trust.
- Whether you share the actual scores or just highlight the highs, lows, and "need more clarity" areas is up to you. But be sure to protect your observers' anonymity by not asking them to disclose the scores they gave you.
- Listen carefully and with an open mind to what your observers have to say.
- Remember to let your observers know that you welcome their feedback and appreciate their support.

SAMPLE LPI EVALUATION

LPI[®]: Leadership Practices Inventory[®] JAMES M. KOUZES & BARRY Z. POSNER Individual Feedback Report

| April 26, 2021

Rooted School Leadership 2020 - 2021



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The Five Practices of Exemplary Leadership®

Created by James M. Source, and Barry Z. Posner in the early 1980s and first identified in their internationally best-selling book, *The Leadership* Challenge, The Five Practices of Exemplary Leadership approaches leadership as a measurable, learnable, and teachable set of behaviors. After conducting hundreds of interviews, reviewing thousands of case studies, and analyzing more than two million survey questionnaires to understand those times when leaders performed at their personal best, there emerged five practices common to making extraordinary things happen. The Five Practices are:



The Leadership Practices Inventory (JPI) instrument is an exential tool to help you gain perspective into how you see yourself as a leader, how others view you, and what actions you can take to improve your use of The Five Practices, which research has demonstrated, year after year, make for more effective leaders.

ABOUT YOUR LPI REPORT

The IPI measures the frequency of 30 specific leadership behaviors on a 10-point scale, with six behavioral statements for each of The Rive Practices. You and the observers you selected rated how frequently you engage in each of these important behaviors associated with The Five Practices. The response tocals is:

1-Almost Never	3-Seldom	5-Occasionally	7-Fairly Often	9-Very Frequently
2-Rarely	4-Once in a While	6-Sometimes	8-Usually	10-Almost always

In the following report pages, you'll see your LPI Self (5) responses and your observer responses, which are categorized into Manager (M), Direct Report (D), Co-Worker (C), and Other (D). Observer responses are categorized as "Other" when there are not enough responses in the Direct Report or Coworker categories to preserve observer anonymity. The average observer rating (AVG) is an average of all LPI observer responses including Manager.

RATER ABBREVIATIONS:

M-Manager	D-Direct Report	C-Co-Worker	0-Other	5-Self	AVG-Average of all Observer Responses
requested a tot	of 9 observers to rate	way of these 7 have	a submitted an	Observer su	rvey as of report date and are included

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The Five Practices Data Summary

This page summarizes your UPI responses for each leadership Practice. The <u>Solitopuppe</u>,shows the total of your own responses to the six behavioral statements about each Practice. The individual Observers columns show the total of each Observer's six responses for the Practice. The AVC column shows the average of <u>allyopy</u> Observers' total responses. Total responses for each Practice can range from 6 to 60; which represents adding up the response score (ranging from 1-Almost Never to 10-Almost Always) for each of the six behavioral statements related to that practice.

M1 C1 C2 01 02 03 04 Model the Way 46 48.6 43 51 47 45 47 53 54 Inspire a Shared Vision 48 53.6 45 58 56 52 56 54 54 Challenge the Process 46 51.1 43 55 54 51 50 55 Enable Others to Act 49 53.1 46 56 54 52 55 54 55	Model the Way 46 48.6 43 51 47 45 47 53 54 Inspire a Shared Vision 48 53.6 45 58 56 52 56 54 54 Challenge the Process 46 51.1 43 55 54 51 50 50 55 Enable 49 53.1 46 56 54 52 55 54 55	Model the Way 46 48.6 43 51 47 45 47 53 54 Inspire a Shared Vision 48 53.6 45 58 56 52 56 54 54 Inspire a Shared Vision 48 51.1 43 55 54 50 54 54 Inspire a Shared Vision 46 51.1 43 55 54 51 50 54 54 Inspire the Process 46 51.1 43 55 54 51 50 50 55 Inspire the Process 49 53.1 46 56 54 52 55 54 55 Inspire the Process 49 51.1 47 51 52 55 54 55 Inspire the Process 31 51.1 47 51 52 55 54 55 Inspire the Process 31 51.1 47 51 52 53 52 Inspire the Process 31 51.1 57 51 52 53		SELF	AVG		IND		AL OF	SERV			
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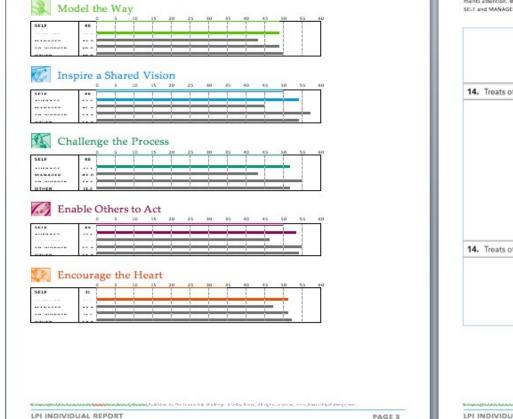


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The Five Practices Bar Graphs

These bar graphs, one set for each leadership Practice, provide a graphic representation of the numerical data recorded on The Five Practices. Data Summary page, By Practice, it shows the total response for Self and the average total for each category of Observer. Average refers to the average for all categories of Observers (including Manager). Total responses can range from 6 to 60), which represents adding up the response score (ranging from 1-Almost Never to Do-Almost Always) for each of the six behavious latarements reliated to that practice.

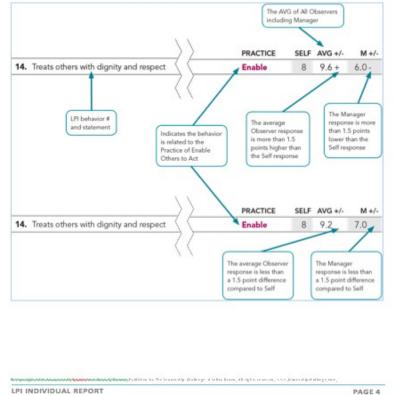




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Leadership Behaviors Ranking

The following page shows the ranking, from most frequent to least frequent, of all 30 leadership behaviors based on the average of your Observent' response. The average (AVG) includes the Manager response, which is also shown separately. Indiratel lines separate the 10 most and the 10 least frequent behaviors from the middle 10. A plus sign (+) next to the AVG or Manager (M) response indicates that the response is more than 1.3 points higher than your Self response; a minus sign (-) indicates that the response is more than 1.5 points higher than your Self response. Since 1.5 is approximately the average difference between self and observer scores, any difference greater than that merits attention. When the +/- column is blank is a gray more, this indicates a reasonable degree of agreement between the SELF and AVG or SELF and AVAGET scores. The response calls in a film of Almost Ageoggs to 10-Almost Ageoggs.





Profile for XXXXXXXXXXXX

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MO	ST FREQUENT	PRACTICE	SELF	AVG +/-	M+/-
7.	Describes a compelling image of what our future could be like	Inspire	9	9.7	8.0
14.	Treats people with dignity and respect	Enable	8	9.7 +	9.0
12.	Appeals to others to share dream of the future	Inspire	9	9.4	9.0
27.	Speaks with genuine conviction about the higher meaning and purpose of our work	Inspire	9	9.3	9.0
24.	Gives people a great deal of freedom and choice in deciding how to do their work	Enable	10	9.1	8.0 -
з.	Seeks out challenging opportunities that test his/her own skills and abilities	Challenge	9	9.1	8.0
9.	Actively listens to diverse points of view	Enable	9	9.1	8.0
22.	Paints the "big picture" of what we aspire to accomplish	Inspire	9	9.0	6.0 -
4.	Develops cooperative relationships among the people he/she works with	Enable	9	8.9	7.0 -
5.	Praises people for a job well done	Encourage	7	8.9 +	8.0
15.	Makes sure that people are creatively recognized for their contributions to the success of Qut projects	Encourage	5	8.9 +	9.0 +
18.	Asks "What can we learn?" when things don't go as expected	Challenge	8	8.7	7.0
13.	Actively searches for innovative ways to improve what we do	Challenge	6	8.7 +	8.0 +
10.	Makes it a point to let people know about his/her confidence in their abilities	Encourage	5	8.6 +	7.0 +
28.	Takes initiative in anticipating and responding to change	Challenge	8	8.4	7.0
8.	Challenges people to try out new and innovative ways to do their work	Challenge	7	8.4	7.0
30.	Gets personally involved in recognizing people and celebrating accomplishments	Encourage	5	8.4 +	7.0 +
20.	Publicly recognizes people who exemplify commitment to shared values	Encourage	4	8.4 +	8.0 +
1	Sets a personal example of what he/she expects of others	Model	8	8.3	7.0
16.	Asks for feedback on how his/her actions affect other people's performance	Model	8	8.3	9.0
19.	Involves people in the decisions that directly impact their job performance	Enable	6	8.3 +	7.0
26.	Is clear about his/her philosophy of leadership	Model	9	8.1	6.0 -
17.	Shows others how their long-term interests can be realized by enlisting in a common vision	Inspire	4	8.1+	6.0 +
2.	Talks about future trends that will influence how our work gets done	Inspire	8	8.0	7.0
6.	Makes certain that people adhere to the principles and standards that have been agreed	Model	7	8.0	8.0
11	Follows through on promises and commitments he/she makes	Model	7	8.0	8.0
29.	Ensures that people grow in their jobs by learning new skills and developing themselves	Enable	7	8.0	7.0
25.	Tells stories of encouragement about the good work of others	Encourage	5	8.0 +	8.0 +
21.	Builds consensus around a common set of values for running our organization	Model	7	7.9	5.0 -
23.	identifies measurable milestones that keep projects moving forward	Challenge	8	7.7	6.0 -

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LPI 360

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LPI INDIVIDUAL REPORT

Clarify values by finding your voice and affirming shared values
 Set the example by aligning actions with shared values

This page shows the responses for each of the six leadership behaviors related to this Practice. The Self-polygg, shows the responses you gave yourself for each behavior. The AVG column shows the averages of the Observers responses. The Individual Observers columns show each Observers response for each behavioral item. Responses can range from 1-Almost Agengt to 10-Almost Always.

		SELF	AVG		IND	VIDU	AL OI	SERV	ERS				
				M1	C1	C2	01	02	03	04			
1.	Sets a personal example of what he/she expects of others	8	8.3	7	9	9	6	8	9	10			
6.	Makes certain that people adhere to the principles and standards that have been agreed upon	7	8.0	8	8	6	9	7	9	9	÷.		
11.	Follows through on promises and commitments he/she makes	7	8.0	8	9	9	5	9	9	7	5		
16.	Asks for feedback on how his/ her actions affect other people's performance	8	8.3	9	10	6	8	6	9	10	6		
21.	Builds consensus around a common set of values for running our organization	7	7.9	5	9	7	8	9	8	9	6		
26.	ls clear about his/her philosophy of leadership	9	8.1	6	6	10	9	8	9	9	é.		
	1-Al 2-Ra	most Ne	ver	3-Sela 4-One	iom xe in a V	While		ocasio			irly Often		Frequently out always
_	M-Manager D-Direct Report		-Co-Wo	rker	0-	Other	5	Self	AV	-Avera	ge of all Ob	erver Rea	onses

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6.	Makes certain that people adhere to the principles and standards that have been agreed upon	AVG S	0 7.0 7.0 7.0 7.0 7.0			4	5	6			10
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16.	Asks for feedback on how his/her actions affect other people's performance	AVG I				4	5	5	7 8	•	10
21.	Builds consensus around a common set of values for running our organization	C I	0 7.9 1.0 5.0 8.5			4	5	6			10
26.	Is clear about his/her philosophy of leadership	c 8				4	S	-			10
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LPI 360

Profile for XXXXXXXXXXXXXXX

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Inspire a Shared Vision Data Summary

Envision the future by imagining exciting and ennobling possibilities
Enlist others in a common vision by appealing to shared aspirations

This page shows the responses for each of the six leadership behaviors related to this Practice. The Self-pojugg, shows the responses you gave yourself for each behavior. The AVG column shows the averages of the Observers responses. The individual Observers columns show each Observers response for each behavioral item. Responses can range from 1-Almost & gaget to 10-Almost Always.

alks about future tre vill influence how ou ets done		8	8.0	M1	C1	C2	01	02	03	04		
vill influence how ou		8	8.0	7								
					10	8	7	9	7	8		
Vescribes a compellir f what our future co ke	g image ald be	9	9.7	8	10	10	10	10	10	10		
ppeals to others to sh ream of the future	are	9	9.4	9	10	9	9	10	10	9		
erm interests can be	realized	4	8.1	6	9	9	9	7	9	8		
		9	9.0	6	10	10	8	10	9	10		
		9	9.3	9	9	10	9	10	9	9		
	1000		ver			Vhile						9-Very Frequenti 10-Almost always
A-Manager D-Dire	ct Report	c	-Co-Wo	rker	0-	Other	5	Self	AVC	i-Averaj	te of all Ob	server Responses
	ee peals to others to sh ream of the future over others how their rm interests can be ventisting in a com- sion ints the "big picture hat we aspire to acco oaks with genuine inviction about the l earling and purpose ork	eaks with genuine mviction about the higher earing and purpose of our ork	ke generation of the future generation about the higher generation about the higher generation and purpose of our ork generation of the generat	ke Image: Second Seco	ke 9 9.4 9 peals to others to share ream of the future 9 9.4 9 oves others how their long- rm interests can be realized alon 4 8.1 6 ints the "big picture" of hat we aspire to accomplish at we aspire to accomplish earling and purpose of our ork 9 9.0 6 1-Almost Never 2-Barely 1-Almost Never 4-Once 3-Seic	ke 9 9.4 9 10 peals to others to share ream of the future 9 9.4 9 10 ows others how their long- rm interests can be realized; enlisting in a common sion 4 8.1 6 9 ints the "big picture" of hat we aspire to accomplish eaks with genuine mviction about the higher earing and purpose of our ork 9 9.0 6 10 1-Almost Never ork 1-Almost Never 4-Once in a V 3-Seldom	ke I I I peals to others to share ream of the future 9 9.4 9 10 9 oves others how their long- rm interests can be realized sion 9 9.4 9 10 9 oves others how their long- rm interests can be realized sion 4 8.1 6 9 9 ints the "big picture" of hat we aspire to accomplish eaks with genuine mviction about the higher earing and purpose of our ork 9 9.0 6 10 10 1-Aimost Newer ork 3-Seldom 4-Once in a White 9 9.3 9 9 10	ke I I I peals to others to share ream of the future 9 9.4 9 10 9 9 oves others how their long- rm interests can be realized sion 4 8.1 6 9 9 9 ints the "big picture" of hat we aspire to accomplish eaks with genuine mviction about the higher earing and purpose of our ork 9 9.0 6 10 10 8 1-Almost Never ork 3-Seldom 3-Seldom 5-C -Manager D-Direct Report C-Co-Worker 0-Other 5-C	ke I I I I peals to others to share ream of the future 9 9.4 9 10 9 9 10 ows others how their long- rm interests can be realized sion 4 8.1 6 9 9 9 7 ints the "big picture" of hat we aspire to accomplish eaks with genuine mviction about the higher earing and purpose of our ork 9 9.0 6 10 10 8 10 1-Airost Never ork 3-Seldom -Once in a While 9-Other 5-Occasion 6-Sometin	ke Image: Second state Im	ke 9 9.4 9 10 9 9 10 9 9 10 9 peals to ofhers to share ream of the future 9 9.4 9 10 9 9 10 10 9 owes others how their long- rm interests can be realized verifisting in a common sion 4 8.1 6 9 9 9 7 9 8 ints the "big picture" of hat we aspire to accomplish eaks with genuine mviction about the higher earing and purpose of our ork 9 9.0 6 10 10 8 10 9 10 1-Aimost Never 3-Seldom 5-Occasionally 7-fail 8-is 5-Semetimes 8-is	ke Image: Second se

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 Talks about future trends that will influence how our work gets done 	AVG C M O	* *.0 9.0 7.0 7.8	1	2	*	4		6	*	*	9 50
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 Appeals to others to share dream of the future 	AVG C M D	9 9.4 9.5 9.0 9.5	-	2	3			6	3	8	9 30
 Shows others how their long-term interests can be realized by enlisting in a common vision 	S AVG C M Q	4 41 9.0 6.0 8.3				4			7		9 10
 Paints the "big picture" of what we aspire to accomplish 	AVG C M O	0 9.0 10.0 9.3	1			4	5		7		9 10
 Speaks with genuine conviction about the higher meaning and purpose of our work 	AVG C M O	93 93 93 93	1	2		4	5	6	7	8	* 10
RESPONSE SCALE I-Almost N -> Rarely M-Manager D-Direct Report (ever C-Co-W		om in a Wh O-Oth		5-Occa 6-Some 5-Self		8-1	Fairly Off Usually rage of a			Frequently nost always ponses



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Challenge the Process Data Summary

Search for opportunities by selaing the initiative and by looking outward for innovative ways to improve
Experiment and take risks by constantly generating small wins and learning from experience

This page shows the responses for each of the six leadership behaviors related to this Practice. The Self-polygg_shows the responses you gave yourself for each behavior. The AVG column shows the averages of the Observers responses. The Individual Observers columns show each Observers response for each behavioral item. Responses can range from 1-Almost Agenet to 10-Almost Always.

		SELE	AVG		IND	VIDU	AL OI	BSERV	/ERS		6		
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opportunitie	s that test his/?	9 her	9.1	8	10	10	9	10	7	10			
			8.4	7	9	9	8	8	9	9	Ċ.		
		6	8.7	8	9	9	8	9	9	9	e.		
		8	8.7	7	10	10	9	7	8	10	đ.		
milestones th	at keep projec	8	7.7	6	8	8	8	8	8	8	e.		
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	opportunitie own skills an Challenges p new and inno their work Actively search innovative w what we do Asks 'What ca when things expected Identifies mea milestones th moving forw	own skills and abilities Challenges people to try ou new and innovative ways to their work Actively searches for innovative ways to improve what we do Asks "What can we learn?" when things don't go as expected Identifies measurable milestones that keep projec moving forward Takes initiative in anticipati and responding to change	Seeks out challenging opportunities that test his/her own skills and abilities 9 Challenges people to try out new and innovative ways to do their work 7 Actively searches for innovative ways to improve what we do 6 Asks "What can we learn?" when things don't go as expected 8 Identifies measurable milestones that keep projects moving forward 8 Takes initiative in anticipating and responding to change 8	opportunities that test his/her own skills and abilities I Challenges people to try out new and innovative ways to do their work 7 8.4 Actively searches for innovative ways to improve what we do 6 8.7 Asks "What can we learn?" when things don't go as expected 8 7.7 Identifies measurable moving forward 8 7.7 Takes initiative in anticipating and responding to change 8 8.4	Seeks out challenging opportunities that test his/her own skills and abilities 9 9.1 8 Challenges people to try out new and innovative ways to do their work 7 8.4 7 Actively searches for innovative ways to improve what we do 6 8.7 8 Asks "What can we learn?" when things don't go as expected 8 8.7 7 Identifies measurable milestones that keep projects moving forward 8 7.7 6 Takes initiative in anticipating and responding to change 8 8.4 7	Image: second challenging opportunities that test his/her own skills and abilities 9 9.1. 8 10 Challenges people to try out new and innovative ways to do their work. 7 8.4 7 9 Actively searches for innovative ways to improve what we do 6 8.7 8 9 Asks "What can we learn?" when things don't go as expected 8 7.7 10 Identifies measurable milestones that keep projects moving forward 8 8.4 7 9 Takes initiative in anticipating and responding to change 8 8.4 7 9	Image: seal of the seal o	Image: service	Image: second challenging opportunities that test his/her own skills and abilities 9 9.1 8 10 10 9 10 Challenges people to try out new and innovative ways to do their work. 7 8.4 7 9 9 8 8 Actively searches for innovative ways to improve what we do 6 8.7 8 9 9 10 9 7 Acks "What can we learn?" when things don't go as expected 8 8.7 7 10 10 9 7 Identifies measurable miliestones that beep projects moving forward 8 8.7 7 9 8 8 Takes initiative in anticipating and responding to change 8 8.4 7 9 8 9 8	Image: Constraint of the image: Constraint of th	Image: Characterized state in the set of th	Image: Challenging opportunities that test his/her own skills and abilities 9 9.1 8 10 10 9 10 7 10 Challenges people to try out new and innovative ways to do their work. 7 8.4 7 9 9 8 8 9 9 10 7 10 Challenges people to try out new and innovative ways to do their work. 7 8.4 7 9 9 8 8 9 9 Actively searches for innovative ways to improve what we do 6 8.7 7 10 10 9 7 8 10 Acks "What can we learn?" when things don't go as expected 8 8.7 7 10 10 9 7 8 10 Identifies measurable milestones that beep projects moving forward 8 7.7 6 8 8 8 8 9 9 9 Identifies measurable milestones that beep projects moving forward 8 8.4 7 9 8 9 8 9 9 9	Image: Challenging opportunities that test his/her own skills and abilities 9 9.1 8 10 10 9 10 7 10 Challenges people to try out new and innovative ways to do their work. 7 8.4 7 9 9 8 8 9 9 10 7 10 Challenges people to try out new and innovative ways to do their work. 7 8.4 7 9 9 8 8 9 9 Actively searches for innovative ways to improve what we do 6 8.7 7 10 10 3 7 8 10 Asks "What can we learn?" when things don't go as expected 8 8.7 7 10 10 3 7 8 8 Identifies measurable milestornes that keep projects moving forward 8 8.7 7 9 8 8 8 8 8 8 8 8 8 8 8 8 8 8 8 8 8 8 8 9 9 9

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LPI 360	Profile for XXXXXXXXX Rooted School Leadership 2020 - 2021 April 26, 2021	LPI 360									e for XXX	XXXXXX rship 2020 - 20: April 26, 20
Search for opportunities by Experiment and take risks b The set of bar graphs for each of the six leadershi	Process Bar Graphs relating the initiative and by looking outward for innovative ways to improve by constantly generating small wins and learning from experience of behaviors related to this Practice provides a graphic representation of your and your	Enable Othe - Foster collaboratio - Strengthen others This page shows the responses for each	n by bu by incre	ilding to easing a	rust an olf-det	d facilitat erminatio	ing read	lationahi) I develop	ng com			the responses you
	by behavior, it shows the response for Self and the average response for each category of i for all categories of Observers (including Manager). Responses can range from 1-Almost	gave yourself for each behavior. The AVG each Observers response for each behavi	oral iter	m. Resp	onses c	an range	from 1	-Almost (HENDER, TO	10-Alm		ervers columns show
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 Seeks out challenging opportunities that test his/her own skills and abilities 	b 0 c 12.6 M 8.2 0 8.0	 Develops cooperative relationships among the people he/she works with 	9	8.9	7	10	8			10 1	-	
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 Asks "What can we learn?" when things don't go as expected 	0 1 2 3 4 5 6 7 8 9 10 A V0 8.7	 Involves people in the decisions that directly impact their job performance 	6	8.3	7	8	9	9	9	8 8	•	
 Identifies measurable milestones that keep projects moving forward 	0 1 2 8 4 5 6 7 8 0 10 AV6 22 M 6 0 6 7 8 0 10	24. Gives people a great deal of freedom and choice in deciding how to do their work	10	9.1	8	10	10	9	9 1	8 1	0	
 Takes initiative in anticipating and responding to change 	0 1 2 3 4 5 6 7 8 9 15 Ave 8.4 - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - <td> Ensures that people grow in their jobs by learning new skills and developing themselves </td> <td>7</td> <td>8.0</td> <td>7</td> <td>8</td> <td>9</td> <td>8</td> <td>8 1</td> <td>8 8</td> <td>F</td> <td></td>	 Ensures that people grow in their jobs by learning new skills and developing themselves 	7	8.0	7	8	9	8	8 1	8 8	F	
RESPONSE SCALE 1-Almost Ne 3- Rarely M-Manager 0-Direct Report C	ver 3-Seldom S-Occasionally 7-Fairly Often 9-Very Frequently 4-Once in a While 6-Sometimes 8-Usually 10-Almost always Co-Worker 0-Other 5-Self AVG-Average of all Observer Responses	1-A 2-R	mast Ne	wer	3-5el 4-0n	dom ce in a W	hile		asional ¹ etimes		7-Fairly Often I-Usually	9-Very Frequent 10-Almost alway
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Profile for XXXXXXXXXXXXXX

Rooted School Leadership 2020 - 2021 April 26, 2021

Enable Others to Act Bar Graphs

Foster collaboration by building trust and facilitating relationships

Strengthen others by increasing self-determination and developing competence

The set of bar graphs for each of the six leadership behaviors related to this Practice provides a graphic representation of your and your Observen' average responses for that behavior. By behavior, it shows the response for Self and the average response for each category of Observer. Average refers to the average response for all categories of Observers (including Manager). Responses can range from 1-Almost Bygggt to 10-Almost Always.

	Develops cooperative relationships among the people he/she works with	AVG	2.0										
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4.	Treats people with dignity and	AVG	9.7										_
respect	c	10.0							-			_	
		M	9.0	-		1	-		-				
		0	9.8			-	-	1	-	1.0			
		5	a	1	2	8	4	5	6	2	8	9	10
9.	Involves people in the decisions that	AVG					_		_		_		~
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		M	7.0			-		-	_	- i - i - i - i - i - i - i - i - i - i	12		
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24.	Gives people a great deal of freedom	AVG	8.5	-	_	_	_	-	_	-	-	_	
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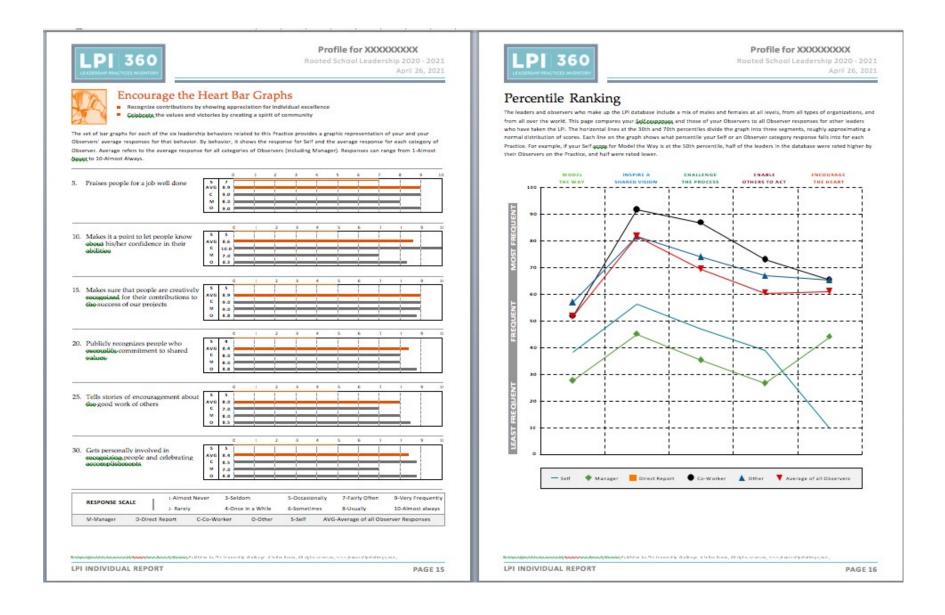
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ncourage the Heart Data Summary Recognize contributions by showing appreciation for individual excellence Collecting the values and victories by creating a spirit of community

This page shows the responses for each of the six leadership behaviors related to this Practice. The <u>Gel_Goujugu</u>, shows the responses you gave yourself for each behavior. The AVG column shows the averages of the Observent response. The Individual Observers columns show each Observers response for each behavioral item. Response can range from 1-Almost <u>A</u>egue to 10-Almost <u>A</u>egue t

	SELF	AVG		IND	IVIDU	AL OI	BSERV	ERS			
	19-17		M1	C1	C2	01	02	03	04		
 Praises people for a job well done 	7	8.9	8	9	9	9	8	9	10		
 Makes it a point to let people know about his/her confidence in their abilities 	5	8.6	7	10	10	7	9	8	9		
 Makes sure that people are creatively recognized for the contributions to the success- our projects 		8.9	9	10	8	9	8	9	9		
20. Publicly recognizes people who exemplify commitment to shared values	4	8.4	8	8	8	9	8	9	9		
25. Tells stories of encouragement about the good work of others	5	8.0	8	6	8	8	10	9	7		
 Gets personally involved in recognizing people and celebrating accomplishment: 	5	8.4	7	8	9	9	9	9	8		
	Almost Ne Rarely	ver	3-Seli 4-Oni	iom ce in a l	While		Occasio			airly Often	9-Very Frequenti 10-Almost always
M-Manager D-Direct Repo	rt C	-Co-We	orker	0-	Other	5	Self	AV	-Aver	age of all Obs	erver Responses



Attachment 11 Teacher Evaluation

Charlotte Danielson's FRAMEWORK FOR TEACHING

DOMAIN 1: Planning and Preparation	DOMAIN 2: The Classroom Environment
 1a Demonstrating Knowledge of Content and Pedagogy Content knowledge • Prerequisite relationships • Content pedagogy 1b Demonstrating Knowledge of Students Child development • Learning process • Special needs Student skills, knowledge, and proficiency Interests and cultural heritage 1c Setting Instructional Outcomes Value, sequence, and alignment • Clarity • Balance Suitability for diverse learners 1d Demonstrating Knowledge of Resources For classroom • To extend content knowledge • For students 1e Designing Coherent Instruction Learning activities • Instructional materials and resources Instructional groups • Lesson and unit structure 1f Designing Student Assessments Congruence with outcomes • Criteria and standards Formative assessments • Use for planning 	 2a Creating an Environment of Respect and Rapport Teacher interaction with students Student interaction with students 2b Establishing a Culture for Learning Importance of content Expectations for learning and behavior Student pride in work 2c Managing Classroom Procedures Instructional groups Transitions Materials and supplies Non-instructional duties Supervision of volunteers and paraprofessionals 2d Managing Student Behavior Expectations Monitoring behavior Response to misbehavior 2e Organizing Physical Space Safety and accessibility Arrangement of furniture and resources
	DOMAIN & Instruction
DOMAIN 4: Professional Responsibilities	DOMAIN 3: Instruction
 4a Reflecting on Teaching Accuracy Use in future teaching 4b Maintaining Accurate Records 	 3a Communicating With Students Expectations for learning Directions and procedures Explanations of content Use of oral and written language
Student completion of assignments Student progress in learning Non-instructional records	3b Using Questioning and Discussion Techniques • Quality of questions • Discussion techniques • Student participation
 4c Communicating with Families About instructional program About individual students Engagement of families in instructional program 	3c Engaging Students in Learning • Activities and assignments • Student groups
 4d Participating in a Professional Community • Relationships with colleagues • Participation in school projects • Involvement in culture of professional inquiry • Service to school 	 Instructional materials and resources Structure and pacing Using Assessment in Instruction Assessment criteria Monitoring of student learning
 4e Growing and Developing Professionally Enhancement of content knowledge and pedagogical skill Service to the profession 	 Feedback to students Student self-assessment and monitoring Demonstrating Flexibility and Responsiveness
 4f Showing Professionalism Integrity/ethical conduct Service to students Advocacy Decision-making Compliance with school/district regulations 	Lesson adjustment Response to students Persistence
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Pre-Observation Planning Template

Teacher Name:

Date:

Content Area:

STANDARDS:

- I. Nevada Academic Content Standard(s):
- II. Common Core Standard (Only if LSS is not applicable):

INDICATORS OF EFFECTIVENESS: List at least <u>two</u> strategies in each category that you plan to use in demonstrating effectiveness in the specific domain components listed below. Use the list of *Critical Attributes* and *Making it Visible* (above) to assist you.

Planning & Preparation 1c:

Managing Classroom Procedures 2c:

Using Questioning & Discussion Techniques 3b:

Engaging Students in Learning 3c:

Using assessment in Instruction 3d:

Teacher Performance Evaluation Rubric

Teacher Name: **Observer:**

Number of Students:

Class Observed:

Date:

ROOTED TEACHER PERFORMANCE EVALUATION RUBRIC

Setting Instructional Outcomes 1c: Teaching is a purposeful activity; even the most imaginative activities are directed towards certain desired learning. Therefore, establishing instructional outcomes entails identifying exactly what students will be expected to learn; the outcomes do not describe what students will do, but what they will learn. The instructional outcomes should reflect important learning and must lend themselves to various forms of assessment so that all students are able to demonstrate their understanding of the content. Insofar as the outcomes determine the instructional activities, the resources used, their suitability for diverse learners, and the methods of assessment employed, they hold a central place in Domain 1. Learning outcomes are of a number of different types: factual and procedural knowledge, conceptual understanding, thinking and reasoning skills, and collaborative and containing in the stategies. In addition, some learning outcomes refer to dispositions; it's important not only for students to learn to read, but educators also hope that they will like to read. In addition, experienced teachers are able to link their learning outcomes with others both within their discipline and in other disciplines.

The elements of component 1c are:

- Value, sequence, and alignment: Students must be able to build their understanding of important ideas from concept to concept Clarity: Outcomes must refer to what students will learn, not what they will do, and must permit viable methods of assessment Balance: Outcomes should reflect different types of learning: such as knowledge, conceptual understanding, and thinking skills Suitability for diverse students: Outcomes must be appropriate for all students in the class

Indicators include:

- Outcomes of a challenging cognitive level
- Statements of student learning, not student activity Outcomes central to the discipline and related to those in other disciplines
- · Permit assessment of student attainment
- · Differentiated for students of varied ability
- □ This element of the performance evaluation rubric <u>was visible</u> during this observation / evaluation.
 □ This element of the performance evaluation rubric <u>was not visible</u> during this observation / evaluation.

	Ineffective	Effective: Emerging	Effective: Proficient	Highly Effective
Possible Examples lc	 All the tasks /activities for a ninth grade history class are factual knowledge. The topic of the social studies unit involves the concept of "revolutions" but the teacher only expects his students to remember the important dates of battles. Despite having a number of ELL students in the class, the outcomes state that all writing must be grammatically correct. 	 Tasks /activities consist of understanding the relationship between addition and mul- tiplication and memorizing facts. The tasks /activities are written with the needs of the "middle" group in mind; however, the advanced students are bored, and some lower level students struggle. 	 One of the learning tasks /activities is for students to "appreciate the aesthet- ics of 18th century English poetry." The asks /activities for the history unit include some factual information, as well as a comparison of the perspectives of different groups in the run-up to the Revolutionary War. The teacher reviews the project expectations and modifies some goals to be in line with students' IEP objectives. 	 The teacher encourages his students to set their own goals; he provides them a taxonomy of challenge verbs to help them strive for higher expectations. Students will develop a concept map that links previous learning goals to those they are currently working on. Some students identify additional learning

а) (Ineffective	Effective: Emerging	Effective: Proficient	Highly Effective
1c: Setting Instructional	Tasks /activities represent low expectations for students and lack of rigor, nor do they all reflect important learning in the discipline.	Tasks /activities represent moder- ately high expectations and rigor. Some reflect important learning in the discipline, and consist of a combination of outcomes.	Most tasks /activities represent rigorous and important learning in the discipline. All the instructional outcomes are clear, written in the form of student learning, and suggest viable methods of assessment.	All tasks /activities represent rigorous and important learning in the discipline. The outcomes are clear, written in the form of student learning, and permit viable methods of assessment.
Outcomes	Tasks /activities are not focused on student learning.	☐ Tasks /activities reflect several types of learning, but teacher has made no attempt at coordination or integration.	☐Tasks /activities reflect several different types of learning and opportunities for coordination.	☐ Tasks /activities reflect several different types of learning and, where ap- propriate, represent opportunities for both coordination and integration.
	one type of learning and only one discipline or strand, and are suitable for only some students.	☐Most of the tasks /activities are suitable for most of the students in the class based on global assessments of student learning.	□Tasks /activities take into account the varying needs of groups of students.	☐Tasks /activities take into account the varying needs of individual students.
	Tasks /activities lack rigor. Tasks /activities do not	Some tasks /activities represent a mixture of low expectations and rigor.	Tasks /activities represent high expectations and rigor.	In addition to the characteristics of "proficient,"
	represent important learning in the discipline.	Some tasks /activities reflect important learning in the discipline.	Tasks /activities are related to "big ideas" of the discipline.	Teacher plans reference curricular frameworks or blueprints to ensure accu- rate sequencing.
·	Tasks /activities are not clear or are stated as activities.	Some tasks /activities are suitable for most of the class.	Tasks /activities are written in terms of what students will learn rather than do	Teacher connects outcomes to previous and future learning.
	Tasks /activities are not suitable for many students in the class.		Tasks /activities represent a range of outcomes: Factual	Tasks /activities are differentiated to encourage individual students to take educational risks.
Critical Attributes			Conceptual Understanding	
			□Reasoning □Social	
			Communication	
			☐ Tasks /activities are suitable to groups of students in the class, differentiated where necessary.	
OBSERVER NOT			☐Tasks /activities are aligned to the LSSS	

Creating an Environment of Respect & Rapport 2a: An essential skill of teaching is that of managing relationships with students and ensuing that relationships among students are positive and supportive. Teachers create an environment of respect and rapport in their classrooms by the ways they interact with students and by the interactions they encourage and cultivate among students. An important aspect of respect and rapport relates to how the teacher responds to students and how students are permitted to treat one another. Patterns of interactions are critical to the overall tone of the class. In a respectful environment, all students feel valued, safe, and comfortable taking intellectual risks. They do not fear put-downs or ridicule from either the teacher or other students.

"Respect" shown to the teacher by students should be distinguished from students complying with standards of conduct and behavior. Caring interactions among teachers and students are the hallmark of component 2a (Creating an Environment of Respect and Rapport); while adherence to the established classroom rules characterizes success in component 2d (Managing Student Behavior).

The elements of component 2a are:

- Teacher interactions with students, including both words and actions
- . A teacher's interactions with students set the tone for the classroom. Through their interactions, teachers convey that they are interested in and care about their students. •
- Student interactions with other students, including both words and actions
- As important as a teacher's treatment of students is, how students are treated by their classmates is arguably even more important to students. · Teachers not only model and teach students how to engage in respectful interactions with one another but also acknowledge such interactions.

Indicators include:

- Respectful talk, active listening, and turn-taking
 Acknowledgment of students' backgrounds and lives outside the classroom
 Body language indicative of warmth and caring shown by teacher and students
- Physical proximity
- Politeness and encouragement Fairness

This element of the performance evaluation rubric <u>was visible</u> during this observation / evaluation.
 This element of the performance evaluation rubric <u>was not visible</u> during this observation / evaluation.

	Ineffective	Effective: Emerging	Effective: Proficient	Highly Effective
Possible Examples 2a	 A student slumps in his chair following a comment by the teacher. Students roll their eyes at a classmate's idea; the teacher does not respond. Many students talk when the teacher and other students are talking; the teacher does not correct them. Some students refuse to work with other students. The teacher does not call students by their names. 	 Students attend passively to the teacher, but tend to talk, pass notes, etc. when other students are talking. A few students do not engage with others in the classroom, even when put together in small groups. The teacher says, "Don't talk that way to your classmates," but the student shrugs her shoulders_ 	 The teacher greets students by name as they enter the class or during the lesson. Students attend fully to what the teacher is saying. Students wait for classmates to finish speaking before beginning to talk. Students applaud politely following a classmate's presentation to the class. Students help each other and accept help from each other. 	 The teacher inquires about a student's SOCCEr game last weekend (or extracurricular activities or hobbies). Students say "Shhh" to classmates who are talking while the teacher or another student is speaking.

a	Ineffective	Effective: Emerging	Effective: Proficient	Highly Effective
2a: Creating an Environment of Respect & Rapport	Patterns of classroom interactions, both between teacher and students and among students, are mostly negative, inappropriate, or insensitive to students' ages, cultural backgrounds, and developmental levels. Student interactions are characterized by sarcasm, put- downs, or conflict. The teacher does not deal with disrespectful behavior.	Patterns of classroom interactions, both between teacher and students and among students, are generally appropriate but may reflect occasional inconsistencies, favoritism, and disregard for students' ages, cultures, and developmental levels. Students rarely demonstrate disrespect for one another. The teacher attempts to respond to disrespectful behavior, with uneven results. The net result of the interactions is neutral, conveying neither warmth nor conflict.	Teacher-student interactions are friendly and demonstrate general caring and respect. Such interactions are appropriate to the ages, cultures, and developmental levels of the students. Interactions among students are generally polite and respectful, and students exhibit respect for the teacher. The teacher responds successfully to disrespectful behavior among students. The net result of the interactions is polite, respectful, and business-like, though students may be somewhat cautious about taking intellectual risks.	Classroom interactions between the teacher and students and among students are highly respectful, reflecting genuine warnth, caring, and sensitivity to students as individuals. Students exhibit respect for the teacher and contribute to high levels of civility among all members of the class. The net result is an environment where all students feel valued and are comfortable taking intellectual risks.
Critical Attributes	☐ The teacher is disrespectful toward students or insensitive to students' ages, cultural backgrounds, and developmental levels. ☐ Students' body language indicates feelings of hurt, discomfort, or insecurity. ☐ The teacher displays no familiarity with, or caring about, individual students. ☐ The teacher disregards disrespectful interactions among students.	☐ The quality of interactions between teacher and students, or among students, is uneven, with occasional disrespect or insensitivity. ☐ The teacher attempts to respond to disrespectful behavior among students, with uneven results. ☐ The teacher attempts to make connections with individual students, but student reactions indicate that these attempts are not entirely successful.	☐ Talk between the teacher and students and among students is uniformly respectful. ☐ The teacher successfully responds to disrespectful behavior among students. ☐ Students participate willingly, but may be somewhat hesitant to offer their ideas in front of classmates. ☐ The teacher makes general connections with individual students. ☐ Students exhibit respect for the teacher.	☐ The teacher demonstrates knowledge and caring about individual students' lives beyond the class and school. ☐ There is no disrespectful behavior among students. ☐ When necessary, students respectfully correct one another. ☐ Students participate without fear of put-downs or ridicule from either the teacher or other students. ☐ The teacher respects and encourages students' efforts.

Establishing a Culture of Learning 2b: A "culture for learning" refers to the atmosphere in the classroom that reflects the educational importance of the work undertaken by both students and teacher. It describes the norms that govern the interactions among individuals about the activities and assignments, the value of hard work and perseverance, and the general tone of the class. The classroom is characterized by high cognitive energy, by a sense that what is happening there is important, and by a shared belief that it is essential, and rewarding, to get it right. There are high expectations for all students; the classroom is a place where the teacher and students value learning and hard work.

Teachers who are successful in creating a culture for learning know that students are, by their nature, intellectually curious, and that one of the many challenges of teaching is to direct the students' natural energy toward the content of the curriculum. They also know that students derive great satisfaction, and a sense of genuine power, from mastering challenging content in the same way they experience pride in mastering, for example, a difficult physical skill.

The elements of component 2b are:

- Importance of the content and of learning In a classroom with a strong culture for learning, teachers convey the educational value of what the students are learning.
- · Expectations for learning and achievement

· In classrooms with robust cultures for learning, all students receive the message that although the work is challenging, they are capable of achieving it if they are prepared to work hard. A manifestation of teachers' expectations for high student achievement is their insistence on the use of precise language by students.

Indicators include:

- Belief in the value of what is being learned High expectations, supported through both verbal and nonverbal behaviors, for both learning and participation
 Expectation of high-quality work on the part of students
- Expectation and recognition of effort and persistence on the part of students
- . High expectations for expression and work products

□ This element of the performance evaluation rubric <u>was visible</u> during this observation / evaluation.
 □ This element of the performance evaluation rubric <u>was not visible</u> during this observation / evaluation.

	Ineffective	Effective: Emerging	Effective: Proficient	Highly Effective
Possible Examples 2b	 The teacher tells students that they're doing a lesson because it's in the book or is district-mandated. Students turn in sloppy or incomplete work. Many students don't engage in an assigned task, and yet the teacher ignores their behavior. Students have not completed their homework; the teacher does not respond. 	 The teacher says, "Let's get through this." The teacher says, "I think most of you will be able to do this." Students consult with one another to determine how to fill in a worksheet, without challenging one another's thinking. The teacher does not encourage students who are struggling. Only some students get right to work after an assignment is given or after entering the room. 	 The teacher says, "This is important; you'll need to speak grammatical English when you apply for a job." The teacher says, "This idea is really important! It's central to our understanding of history." The teacher says, "Let's work on this together; it's hard, but you all will be able to do it well." The teacher hands a paper back to a student, saying, "I know you can do a better job on this." The student accepts it without complaint. Students get to work right away when an assignment is given or after entering the room. 	 The teacher says, "It's really fun to find the patterns for factoring polynomials." A student says, "I don't really understand why it's better to solve this problem that way." A student asks a classmate to explain a concept or procedure since he didn't quite follow the teacher's explanation. Students question one another on answers. A student asks the teacher for permission to redo a piece of work since she now sees how it could be strengthened.

19	Ineffective	Effective: Emerging	Effective: Proficient	Highly Effective
2b: Establishing a Culture of Learning	The classroom culture is characterized by a lack of teacher or student commiment to learning, and/ or little or no investment of student energy in the task at hand. Hard work and the precise use of language are not expected or valued. Medium to low expectations for student achievement are the norm, with high expectations for learning reserved for only one or two students.	☐ The classroom culture is characterized by little commitment to learning by the teacher or students. ☐ The teacher appears to be only "going through the motions," and students indicate that they are interested in the completion of a task rather than the quality of the work. ☐ The teacher conveys that student success is the result of natural ability rather than hard work, and refers only in passing to the precise use of language. ☐ High expectations for learning are reserved for those students thought to have a natural aptitude for the subject.	☐ The classroom culture is a place where learning is valued by all. ☐ High expectations for both learning and hard work are the norm for most students. ☐ Students understand their role as learners and consistently expend effort to learn. ☐ Classroom interactions support learning, hard work, and the precise use of language.	☐ The classroom culture is a cognitively busy place, characterized by a shared belief in the importance of learning. ☐ The teacher conveys high expectations for learning for all students and insists on hard work. ☐ Students assume responsibility for high quality by initiating improvements, making revisions, adding detail, and/or assisting peers in their precise use of language.
Critical Attributes	The teacher conveys that there is little or no purpose for the work, or that the reasons for doing it are due to external factors. The teacher conveys to at least some students that the work is too challenging for them. Students exhibit little or no pride in their work. Students use language incorrectly; the teacher does not correct them.	The teacher's energy for the work is neutral, neither indicating a high level of commitment nor ascribing the need to do the work to external forces. The teacher conveys high expectations for only some students. Students exhibit a limited commitment to complete the work on their own; many students indicate that they are looking for an "easy path." The teacher's primary concern appears to be to complete the task at hand. The teacher urges, but does not insist, that students use precise language.	The teacher communicates the importance of the content and the conviction that with hard work all students can master the material. The teacher demonstrates a high regard for students' abilities. The teacher conveys an expectation of high levels of student effort. Students expend good effort to complete work of high quality. The teacher insists on precise use of language by students.	☐ The teacher communicates passion for the subject. ☐ The teacher conveys the satisfaction that accompanies a deep understanding of complex content. ☐ Students indicate through their questions and comments a desire to understand the content. ☐ Students assist their classmates in understanding the content. ☐ Students take initiative in improving the quality of their work. ☐ Students correct one another in their use of language.

Managing Classroom Procedures 2c: A smoothly functioning classroom is a prerequisite to good instruction and high levels of student engagement. Teachers establish and monitor routines and procedures for the smooth operation of the classroom and the efficient use of time. Hallmarks of a well-managed classroom are that instructional groups are used effectively, non-instructional tasks are completed efficiently, and transitions between activities and management of materials and supplies are skillfully done in order to maintain momentum and maximize instructional time. The establishment of efficient routines, and teaching students to employ them, may be inferred from the sense that the class "runs itself."

The elements of component 2c are:

- Management of instructional groups: Teachers help students to develop the skills to work purposefully and cooperatively in groups, with little supervision from the teacher
 Management of transitions: Many lessons engage students in different types of activities large group, small group, independent work. It's important that little time is lost as students move from one activity to another; students know the "drill" and execute it seamlessly
 Management of materials and supplies: Experienced teachers have all necessary materials to hand, and have taught students to implement routines for distribution and collection of materials with a minimum of disruption to the flow of instruction
 Performance of non-instructional duties: Overall, little instructional time is lost in activities such as taking attendance, recording the lunch count, or the return of permission states and content of the state of the states of the state of the states of the state of the states.
- slips for a class trip.

Indicators include:

Smooth functioning of all routines

Students playing an important role in carrying out the routines
Students know what to do, where to move

Little or no loss of instructional time

□ This element of the performance evaluation rubric <u>was visible</u> during this observation / evaluation.
 □ This element of the performance evaluation rubric <u>was not visible</u> during this observation / evaluation.

	Ineffective	Effective: Emerging	Effective: Proficient	Highly Effective
Possible Examples 2c	 When moving into small groups, students are confused as to where they are supposed to go, whether they should take their chairs, etc. There are long lines for materials and supplies or distributing supplies is time-consuming. Students bump into one another lining up or sharpening pencils. Roll-taking consumes much time at the beginning of the lesson and students are not working on anything. Most students ask what they are to do or look around for clues from others. 	 Some students not working with the teacher are not productively engaged in learning. Transitions between large and small group activities are rough but they are ac- complished. Students are not sure what to do when materials are being distributed or collected. Students ask some clarifying questions about procedures The attendance or hunch count consumes more time than it would need if the procedure were more rou- tinized. 	 Students get started on an activity while the teacher takes attendance. Students move smoothly between large and small group activities. The teacher has an established timing device, such as counting down, to signal students to return to their desks. Teacher has an established attention signal, such as raising a hand, or dimming the lights. One member of each small group collects materials for the table. In small group work, students have established roles, they listen to one another, summarize g different views, etc. Clean-up at the end of a lesson is fast and efficient. 	 Students redirect classmates in small groups not working directly with the teacher to be more efficient in their work. A student reminds classmates of the roles that they are to play within the group. A student redirects a classmate to the table s/ he should be at following a transition. Students propose an improved attention signal. Students independently check themselves into class on the attendance board.

3b: Using Questioning and Discussion Techniques: Questioning and discussion are the only instructional strategies specifically referred to in the framework for teaching; this reflects their central importance to teachers' practice. But in the framework, it is important that questioning and discussion are used as techniques to deepen student understanding, rather than serving as recitation, or a verbal "quiz." Good teachers use divergent as well as convergent questions, framed in such a way that they invite students to formulate hypotheses, make connections, or challenge previously held views. Students' responses to questions are valued; effective teachers are especially adept at responding to and building on dent responses and making use of their ideas. High quality questions encourage students to make connections among concepts or events previously believed to be unrelated, and arrive at new understandings of complex material. Effective teachers also pose questions for which they do not know the answers. Even when a question has a limited number of correct responses, the question, being non-formulaic, is likely to promote thinking by students. Class discussions are animated, engaging all students in important issues and in using their own language to deepen and extend their understanding. They may be based around questions formulated by the students then selves

Not all questions must be at a high cognitive level in order for a teacher's performance to be rated at a high level; that is, when exploring a topic, a teacher might begin with a series of questions of low cognitive challenge to provide a review, or to ensure that everyone in the class is "on board." Furthermore, if questions are at a high level, but only a few students participate in the discussion, the teacher's performance on the component cannot be judged to be at a high level. In addition, in lessons involving students in small-group work, the quality of the students' questions and discussion in their small groups may be considered as part of this component.

Elements of Component 3b are:

- Quality of questions/prompts: Questions of high quality cause students to think and reflect, to deepen their understanding, and to test their ideas against those of their classmates. When teachers ask questions of high quality, they ask only a few of them, and they provide students with sufficient time to think about their response, to reflect on the comments of their classmates, and to deepen their understanding. Occasionally, for the purposes of review, teachers ask students a series of (usually low-level) questions in a type of verbal quiz. This may be helpful for the purpose of establishing the facts of an historical event, for example, but they should not be confused with the use of
- In a type of veroal quit. Intum you negative to the purpose of constraints, and the purpose of constraints and the purpose o
- Student participation: In some classes a few students tend to dominate the discussion, other students, recognizing this pattern, hold back their contributions. Teacher uses a range of techniques to ensure that all students contribute to the discussion, and enlist the assistance of students to ensure this outcome.

Indicators include:

- · Questions of high cognitive challenge, formulated by both students and teacher
- Questions with multiple correct answers, or multiple approaches even when there is a single correct response
- · Effective use of student responses and ideas
- Discussion with the teacher stepping out of the central, mediating role .
- High levels of student participation in discussion

 This element of the performance evaluation rubric <u>was visible</u> during this observation / evaluation.
 This element of the performance evaluation rubric <u>was visible</u> during this observation / evaluation. This element of the performance evaluation rubric was not visible during this observation / evaluation.

	Ineffective	Effective: Emerging	Effective: Proficient	Highly Effective
Possible Examples 3b	 All questions are of the "recitation" type, such as "What is 3 x 4?" The teacher asks a ques- tion for which the answer is on the board; students respond by reading it. The teacher only calls on students who have their hands up. 	 Many questions are of the "recitation" type, such as "How many members of the House of Representatives are there?" The teacher asks: "Who has an idea about this?" but the same three students offer comments. The teacher asks: "Michael, can you comment on Mary's idea?" but Michael does not respond, or makes a comment directly to the teacher. 	 The teacher uses plural the form in asking questions, such as: "What are some things you think might contribute to?" The teacher asks: "Michael, can you comment on Mary's idea?" and Michael responds directly to Mary. The teacher asks a question and asks every student to write a brief response, then share with a partner before inviting a few to offer their ideas to the entire class. 	 A student asks "How many ways are there to get this answer?" A students says to a classmate: "I don't think I agree with you on this because" A student asks of other students: "Does anyone have another idea as to how we might figure this out?

	Ineffective	Effective: Emerging	Effective: Proficient	Highly Effective
	Teacher's questions are of low cognitive challenge, single correct responses, and asked in rapid succession.	Teacher's questions lead students through a single path of inquiry, with answers seemingly determined in advance.	While the teacher may use some low-level questions, he or she poses questions to students designed to promote student thinking and understanding.	☐ Teacher uses a variety or se- ries of questions or prompts to challenge students cognitively, advance high level thinking and discourse, and promote meta-
3b: Using questioning/ prompts and discussion	Interaction between teacher and students is predominantly recitation style, with the teacher mediating all questions and answers.	☐ Alternatively the teacher attempts to frame some questions designed to promote student thinking and understanding, but only a few students are involved.	☐ Teacher creates a genuine discussion among students, providing adequate time for students to respond, and stepping aside when appropriate.	cognition. Students formulate many questions, initiate topics and make unsolicited contributions.
	A few students dominate the discussion.	☐ Teacher attempts to engage all students in the discussion and to encourage them to respond to one another, with uneven results.	Teacher successfully engages most students in the discussion, employing a range of strategies to ensure that most students are heard.	Students themselves ensure that all voices are heard in the discussion.
Critical Attributes	Questions are rapid-fire, and convergent, with a single correct answer. Questions do not invite stu- dent thinking. All discussion is between teacher and students; students are not invited to speak directly to one another. A few students dominate the discussion.	 ☐ Teacher frames some questions designed to promote student thinking, but only a few students are involved. ☐ The teacher invites students to respond directly to one another's ideas, but few students respond. ☐ Teacher calls on many students, but only a small number actually participate in the discussion. 	Teacher uses open-ended questions, inviting students to think and/or have multiple possible answers. The teacher makes effective use of wait time. The teacher builds on uses student responses to questions effectively. Discussions enable students to talk to one another, without ongoing mediation by the teacher. The teacher calls on most students, even those who don't initially volunteer. Many students activaly angage in	In addition to the characteristics of "proficient," Students initiate higher-order questions. Students extend the discussion, enriching it. Students invite comments from their classmates during a discussion
			Many students actively engage in the discussion.	

	Ineffective	Effective: Emerging	Effective: Proficient	Highly Effective
	Much instructional time is lost due to inefficient classroom routines and procedures.	Some instructional time is lost due to only partially effective classroom routines and procedures.	There is little loss of instructional time due to effective classroom routines and procedures.	Instructional time is maximized due to efficient classroom routines and procedures.
2c: Managing classroom procedures	 There is little or no evidence of the teacher managing instructional groups, transitions, and/or the handling of materials and supplies effectively. There is little evidence that students know or follow established routines. 	 ☐ The teacher's management of instructional groups, transitions. ☐ The handling of materials and sup- plies is inconsistent, leading to some disruption of learning. ☐ With regular guidance and prompting, students follow established routines. 	☐ The teacher's management of instructional groups and/or the handling of materials and supplies are consistently successful. ☐With minimal guidance and prompting, students follow established classroom routines.	☐ Students contribute to the management of instructional groups, transitions, and/or the handling of materials and supplies. ☐ Routines are well understood and may be initiated by students.
Critical Attributes	 Students not working with the teacher are disruptive to the class. There are no established procedures for distributing and collecting materials. Procedures for other activities are confused or chaotic. 	 Small groups are only partially engaged while not working directly with the teacher. Procedures for transitions, and distribution/collection of materials, seem to have been established, but their operation is rough. Classroom routines function unevenly 	The students are productively engaged during small group work. Transitions between large and small group activities are smooth. Routines for distribution and collection of materials and supplies work efficiently. Classroom routines function smoothly.	Students take the initiative with their classmates to ensure that their time is used productively. Students themselves ensure that transitions and other routines are accomplished smoothly. Students take initiative in distributing and collecting

	Ineffective	Effective: Emerging	Effective: Proficient	Highly Effective
3c: Engaging students in	☐ The learning tasks and ac- tivities, materials, resources, instructional groups and technology are poorly aligned with the instructional out- comes, or require only rote responses. ☐ The pace of the lesson is too slow or rushed.	 The learning tasks or prompts are partially aligned with the instructional out- comes but require only minimal thinking by students, allowing most students to be passive or merely compliant. The pacing of the lesson may not provide students the time needed to be intellectually engaged. 	☐ The learning tasks and activities are aligned with the instructional standards and are designed to challenge student thinking, resulting in active intellectual engagement by most students with important and challenging content, and with teacher scaffolding to support that engagement.	 □ Virtually all students are intellectually engaged in challenging content, through well- designed learning tasks, and suitable scaffolding by the teacher, and fully aligned with the instructional outcomes. □ In addition, there is evidence of some student initiation of inquiry, and student contributions to the exploration of important content.
learning	Few students are intellectu- ally engaged or interested.		☐ The pacing of the lesson is appropriate, providing most students the time needed to be intellectually engaged.	The pacing of the lesson provides students the time needed to intellectually engage with and reflect upon their learning, and to consolidate their understanding.
				Students may have some choice in how they complete tasks and may serve as resources for one another.
	Few students are intellectually engaged in the lesson.	Some students are intellectually engaged in the lesson. Learning tasks are a mix of those	Most students are intellectually engaged in the lesson.	In addition to the characteristics of "proficient," Virtually all students are highly engaged in the lesson.
	Learning tasks require only recall or have a single correct response or method. The materials used ask	requiring thinking and recall. Student engagement with the content is largely passive, learning primarily facts or procedures.	Learning tasks have multiple correct responses or approaches and/or demand higher order thinking.	☐ Students take initiative to modify a learning task to make it more meaningful or relevant to their needs.
Critical	students only to perform rote tasks.	Students have no choice in how they complete tasks.	Students have some choice in how they complete learning tasks.	Students suggest modifications to the grouping patterns used.
Attributes	Only one type of instructional group is used (whole group, small groups) when variety would better serve the instructional	 The teacher uses different instructional groupings; these are partially successful in achieving the lesson objectives. The materials and resources are 	There is a mix of different types of groupings, suitable to the lesson objectives.	Students have extensive choice in how they complete tasks.
	purpose. Instructional materials used are unsuitable to the	partially aligned to the lesson objectives, only some of them demanding student thinking.	Materials and resources support the learning goals and require	Students suggest modifications or additions to the materials being used.
	lesson and/or the students. The lesson drags, or is rushed.	☐ The pacing of the lesson is uneven; suitable in parts, but rushed or dragging in others.	intellectual engagement, as appropriate.	Students have an opportunity for reflection and closure on the lesson to consolidate their understanding.

Engaging Students in Learning 3c: Student engagement in learning is the centerpiece of the framework for teaching; all other components contribute to it. When students are engaged in learning, they are not merely "busy," nor are they only "on task." Rather, they are intellectually active in learning important and challenging content. The critical distinction between a classroom in which students are compliant and busy, and one in which they are engaged, is that in the latter students are developing their understanding through what they do. That is, they are engaged in discussion, debate, answering "what if?" questions, discovering patterns, and the like. They may be selecting their work from a range of (teacher arranged) choices, and making important contributions to the intellectual life of the class.

A lesson in which students are engaged usually has a discernible structure: a beginning, a middle, and an end, with scaffolding provided by the teacher or by the activities themselves. Student tasks are organized to provide cognitive challenge, and then students are encouraged to reflect on what they have done and what they have learned. That is, there is closure to the lesson, in which students derive the important learning from their own actions. A critical question for an observer in determining the degree of student engagement is "What are the students being asked to do?" If the answer to that question is that they are filling in blanks on a worksheet, or performing a rote procedure, they are unlikely to be cognitively engaged. The best evidence for student engagement is what students are saying and doing as a consequence of what the teacher does, or has done, or has planned.

Elements of Component 3c are:

- Activities and assignments: The activities and assignments are the centerpiece of student engagement, since they determine what it is that students are asked to do. Activities
 and assignments that promote learning are aligned with the goals of the lesson, and require student thinking that emphasizes depth over breadth, and that may allow students to exercise some choice
- Grouping of students: How students are grouped for instruction is one of the many decisions teachers make every day. There are many options; students of similar background and skill may be clustered together, or the more advanced students may be spread around into the different groups. Alternatively, a teacher might permit students to select their own groups, or they could be formed randomly.
- Instructional materials and resources: The instructional materials a teacher selects to use in the classroom can have an enormous impact on students' experience. Some are better suited to engaging students in deep learning, for example, the use of primary source materials in social studies.
- Structure and pacing. Keeping things moving, within a well-defined structure, is one of the marks of an experienced teacher. And since much of student learning results from their reflection on what they have done, a well-designed lesson includes time for reflection and closure.

Indicators include:

- Activities aligned with the goals of the lesson
- Student enthusiasm, interest, thinking, problem-solving, etc Learning tasks that require high-level student thinking and are aligned with
- lesson objectives
- Students highly motivated to work on all tasks and are persistent even when

the tasks are challenging

- Students actively "working," rather than watching while their teacher "works."
- Suitable pacing of the lesson: neither dragging nor rushed, with time for closure and student reflection

This element of the performance evaluation rubric <u>was visible</u> during this observation / evaluation.
 This element of the performance evaluation rubric <u>was not visible</u> during this observation / evaluation.

	Ineffective	Effective: Emerging	Effective: Proficient	Highly Effective
Possible Examples	 Students are able to fill out the lesson worksheet with- out understanding what it's asking them to do. The lesson drags, or feels rushed. Students complete "busy work" activities. 	 Students are asked to fill in a worksheet, following an established procedure. There is a recognizable beginning, middle, and end to the lesson. Parts of the lesson have a suitable pace; other parts drag or feel rushed. 	 Students are asked to formulate a hypothesis about what might happen if the American voting system allowed for the direct election of presidents. Students are given a task to do independently, then to discuss with a table group, followed by a report-out from each table. There is a clear beginning, middle, and end to the lesson. 	 Students are asked to write an essay "in the style of Hemingway." A student asks whether they might remain in their small groups to complete another section of the activity, rather than work independently. Students identify or create their own learning materials. Students summarize their learning.

Using Assessment in Instruction 3d: Assessment of student learning plays an important role in instruction; no longer does it signal the end of instruction; it is now recognized to be an integral part of instruction. While assessment of learning has always been and will continue to be an important aspect of teaching (it's important for teachers to the optimized to be an integrat part of instruction, while assessment of rearining has an ways oeen and win commute to be an integrat part of instruction, while assessment of rearining has increasingly come to play an important role in classics. And in order to assess student learning for the purposes of instruction, teachers must have their finger on "the pulse" of a lesson, monitoring student understanding and, where appropriate, offering feedback to students. When teachers monitor student learning, they look carefully at what students are writing, or listen carefully to the questions students ask, in order to gauge whether they require additional activity or explanation in order to gauge whether they two situations

Questions asked of students for the purpose of monitoring learning, are fundamentally different from those used to build understanding; in the former, teachers are alert to students' revealed misconceptions, whereas in the latter the questions are designed to explore relationships, or deepen understanding. Encouraging students (and actually teaching them the necessary skills) of monitoring their own learning against clear standards is demonstrated by teachers at high levels of performance.

Elements of Component 3d are:

- Assessment Criteria: It is essential that students know the criteria for assessment. At its highest level, students themselves have had a hand in articulating the criteria for, for example, a clear oral presentation.
- Monitoring of student learning: A teacher's skill in eliciting evidence of student understanding is one of the true marks of expertise. This is not a hit-or-miss effort, but is
 planned carefully in advance. But even after carefully planning, monitoring of student learning must be woven seamlessly into the lesson, using a variety of techniques.
- Feedback to students: Feedback on learning is an essential element of a rich instructional environment; without it, students are constantly guessing as to how they are doing, and how their work can be improved. Valuable feedback must be timely, constructive, and substantive, and provide students the guidance they need to improve their performance.
- Student self-assessment and monitoring of progress: The culmination of student assumption of responsibility for their learning is when they monitor their own learning, and take appropriate action. Of course, they can only do this if the criteria for learning are clear and if they have been taught the skills of checking their work against clear criteria

Indicators include:

- Teacher paying close attention to evidence of student understanding
 Teacher posing specifically-created questions to elicit evidence of student
- understanding
- · Teacher circulating to monitor student learning and to offer feedback
- Students assessing their own work against established criteria
- Teacher adjusting instruction in response to evidence of student understanding (or lack of it)
- This element of the performance evaluation rubric <u>was visible</u> during this observation / evaluation.
 This element of the performance evaluation rubric <u>was not visible</u> during this observation / evaluation.

	Ineffective	Effective: Emerging	Effective: Proficient	Highly Effective
Possible Examples	 A student asks: "How is this assignment going to be graded?" A student asks "Does this quiz count towards my grade?" The teacher forges ahead with a presentation without checking for understanding. 	 Teacher asks: "Does anyone have a question? When a student completes a problem on the board, the teacher corrects the student's work without explaining why. The teacher, after receiving a correct response from one student, continues, without ascertaining whether all students understand the 	The teacher circulates during small group or independent work, offering suggestions to groups of students. The teacher uses a specifically formulated question to elicit evidence of student understanding. The teacher asks students to look over their papers to correct their errors.	The teacher reminds students of the characteristics of high-quality work (the assessment criteria) While students are working, the teacher circulates providing substantive feedback to individual students. The teacher uses exit tickets to elicit evidence of individual student understanding. Students offer feedback to their classmates on their work. Students evaluate a piece of their writing against the writing rubric and confer with the teacher about how
	 The teacher says: "good job, everyone." 	concept.		to improve.

63	Ineffective	Effective: Emerging	Effective: Proficient	Highly Effective
	There is little or no assessment or monitoring of student learning; feedback is absent, or of poor quality.	Assessment is used sporadically to support instruction, through some monitoring of progress of learning by teacher and/or students.	Assessment is regularly used during instruction, through Monitoring of progress of learning by teacher and/or students	Assessment is fully integrated into instruction, through extensive use of formative assessment.
3d: Using Assessment in Instruction	Students do not appear to be aware of the assessment criteria and do not engage in self-assessment	Feedback to students is general, and students appear to be only partially aware of the assessment criteria used to evaluate their work but few assess their	Resulting in accurate, specific feedback that advances learning.	Students appear to be aware of, and there is some evidence that they have contributed to, the assessment criteria.
Instruction	self-assessment.	own work.	Students appear to be aware of the assessment criteria; some of them engage in self-assessment.	progress.
		Questions/prompts/ assessments are rarely used to diagnose evidence of learning.	Questions/ prompts/ assessments are used to diagnose evidence of learning.	A variety of feedback, from both the teacher and peers, is accurate, specific, and advances learning.
				Questions/prompts/assessments are used regularly to diagnose evidence of learning.
	The teacher gives no indication of what high	There is little evidence that the students understand how their work will	Students indicate that they clearly understand the characteristics	In addition to the characteristics of "proficient,"
	quality work looks like.	be evaluated. Teacher monitors understanding	of high quality work.	There is evidence that students have helped establish the evaluation criteria.
	The teacher makes no effort to determine whether students understand the lesson.	through a single method, or without eliciting evidence of understanding from all students.	The teacher elicits evidence of student understanding during the lesson Students are invited to assess their own work and make im-	Teacher monitoring of student understanding is sophisticated and continuous: the teacher is constantly "taking the pulse" of
	Feedback is only global.	Teacher requests global indications of student understanding.	provements.	the class.
Critical Attributes	The teacher does not ask students to evaluate their own or classmates' work.	☐ Feedback to students is not uniformly specific, not oriented towards future improvement of work.	Feedback includes specific and timely guidance for at least groups of students.	Teacher makes frequent use of strategies to elicit information about individual student understanding.
		The teacher makes only minor attempts to engage students in self- or	The teacher attempts to engage students in self- or peer-assessment.	Feedback to students is specific and timely, and is provided from many sources, including other students.
		peer-assessment.	When necessary, the teacher makes adjustments to the lesson to enhance understanding by groups of students.	Students monitor their own understanding, either on their own initiative or as a result of tasks set by the teacher.
~				☐ The teacher's adjustments to the lesson are designed to

Domain IV: PROFESSIONAL RESPONSIBILITIES

4a Reflecting on Teaching: Reflecting on teaching encompasses the teacher's thinking that follows any instructional event, an analysis of the many decisions made in both the planning and the implementation of a lesson. By considering these elements in light of the impact they had on student learning, teachers can determine where to focus their efforts in making revisions and choose which aspects of the instruction they will continue in future lessons. Teachers may reflect on their practice through collegial conversations, journal maxing revisions and choose which aspects of the instruction they will continue in future lessons. Teachers may reflect on their practice through collegial conversations, journal writing, examining student work, conversations with students, or simply thinking about their teaching. Reflecting with accuracy and specificity, as well as being able to use in future teaching what has been learned, is an acquired skill, mentors, coaches, and supervisors can help teachers acquire and develop the skill of reflecting on teaching through supportive and deep questioning. Over time, this way of thinking both reflectively and self-critically and of analyzing instruction through the lens of student learning—whether excellent, adequate, or inadequate—becomes a habit of mind, leading to improvement in teaching and learning.

Indicators include:

- Accurate reflections on a lesson
- Citation of adjustments to practice that draw on a repertoire of strategies

Ineffective	Effective: Emerging	Effective: Proficient	Highly Effective
Additional Information:			

4b Maintaining Accurate Records: An essential responsibility of professional educators is keeping accurate records of both instructional and non-instructional events. These include student completion of assignments, student progress in learning, and non-instructional activities that are part of the day-to-day functions in a school setting, such as the return of signed permission slips for a field trip and money for school pictures. Proficiency in this component is vital because these records inform interactions with students and parents and allow teachers to monitor learning and adjust instruction accordingly. The methods of keeping records vary as much as the type of information being recorded. For example, teachers may keep records of formal assessments electronically, using spreadsheets and databases, which allow for item analysis and individualized instruction. A less formal means of keeping track of student progress may include anecdotal notes that are kept in student folders.

- Routines and systems that track student completion of assignments
- Systems of information regarding student progress against instructional outcomes
- Processes of maintaining accurate non-instructional records

Ineffective	Effective: Emerging	Effective: Proficient	Highly Effective
Additional Information:			

4e Growing & Developing Professionally: As in other professions, the complexity of teaching requires continued growth and development in order for teachers to remain current. Continuing to stay informed and increasing their skills allows teachers to become ever more effective and to exercise leadership among their colleagues. The academic disciplines themselves evolve, and educators constantly refine their understanding of how to engage students in learning; thus, growth in content, pedagogy, and information technology are essential to good teaching. Networking with colleagues through such activities as joint planning, study groups, and lesson study provides opportunities for teachers to learn from one another. These activities allow for job-embedded professional development. In addition, professional educators increase their effectiveness in the classroom by belonging to professional organizations, reading professional journals, attending educational conferences, and taking university classes. As they gain experience

- Frequent teacher attendance in courses and workshops; regular academic reading Participation in learning networks with colleagues; freely shared insights
- Participation in professional organizations supporting academic inquiry

Ineffective	Effective: Emerging	Effective: Proficient	Highly Effective	
Additional Information:				

4f Showing Professionalism: Expert teachers demonstrate professionalism in service both to students and to the profession. Teaching at the highest levels of performance in this component is student focused, putting students first regardless of how this stance might challenge long-held assumptions, past practice, or simply the easier or more convenient procedure. Accomplished teachers have a strong moral compass and are guided by what is in the best interest of each student. They display professionalism in a number of ways. For example, they conduct interactions with colleagues in a manner notable for honesty and integrity. Furthermore, they know their students' needs and can readily access resources with which to step in and provide help that may extend beyond the classroom. Seeking greater flexibility in the ways school rules and policies are applied, expert teachers advocate with students in ways that might challenge traditional views and the educational establishment. They also display professionalism in the ways they approach problem solving and decision making, with student needs constantly in mind. Finally, accomplished teachers consistently adhere to school and district policies and procedures but are willing to work to improve those that may be outdated or ineffective.

- The teacher having a reputation as being trustworthy and often sought as a sounding board
- The teacher frequently reminding participants during committee or planning work that students are the highest priority The teacher supporting students, even in the face of difficult situations or conflicting policies
- The teacher consistently fulfilling district mandates regarding policies and procedure

Ineffective	Effective: Emerging	Effective: Proficient	Highly Effective
Additional Information:			

Teacher Post-Observation Form

Ρ	ost-Obs	ervation	& Self	-Reflection	Form
Teach	er Name:	Date:		Content Area:	
a way relate	for you to commun	icate with your evalu ervation, making ce	ator. Please tal	ty and a vehicle for self-refle te a moment to complete the any pertinent evidence tha	document as it
Please	check the box below	and include any open-	ended feedback	you think pertinent:	
1.	-		-	set out to deliver to your stude C/CCS, how would you rate yo	_
	Ineffective Emerging Effective Highly Effective				
2.			is lesson? With 1	respect to planning and prepar	ation, how
	would you rate your Ineffective Emerging Effective Highly Effective	self?			
	What, if anything, w Explain:	ould you do differentl	y the next time y	ou deliver this lesson?	
3.		classroom managemer	nt. With respect t	to overall classroom managem	ent how would
	Ineffective Emerging Effective Highly Effective				
	Explain:				

	4.	Were the classroom procedures and routines conducive to learning and student engagement? With respect to classroom procedures and routines, how would you rate yourself?
		Ineffective
		Explain:
	5.	Did students respond to your questioning strategies? With respect to questioning strategies that you employed, how would you rate yourself?
		Ineffective
		Explain:
	6.	Were most students engaged in the lesson throughout the period? With respect to student engagement How would you rate yourself?
		Ineffective
		How did you assess students' engagement?
		Explain:
	7.	Did your formal and/or informal assessment(s) both during and after the lesson yield the results you expected? With respect to assessment in instruction, how would you rate yourself?
		Ineffective Emerging Effective Highly Effective Explain:
L		Capian.

Pre-Observation Planning Template

STANDARDS:

I. Nevada Academic Content Standards:

https://doe.nv.gov/Nevada_Academic_Content_Standards/

II. Common Core Standards:

http://www.corestandards.org

III. Tech Content Area Standards (Tech Teachers Only):

*ISTE Standards (below)

https://www.iste.org/standards/for-students

https://www.iste.org/explore/articleDetail?articleid=1014

*SETDA Standards (below)

https://www.brookings.edu/wp-content/uploads/2016/06/0410_curriculum_chingos_whitehurst.pdf

Planning & Preparation 1c:

Learning objectives are a way for teachers to structure, sequence, and plan out learning goals for a specific instructional period (e.g. 60 minutes) typically for the purpose of moving students toward the achievement of larger, longer-term educational goals such as meeting course learning expectations, performing well on a standardized assessment, etc...

You should create a statement similar to this:

At the end of this 60 minute lesson, students will be able to XXXXXXXX as evidenced by XXXXXXXXX.

You can place these three statements on the board or on your projection screen to make the objective of your lesson more visible to the observer.

- a) Today I will be learning XXXXXXXXX
- b) I am learning this because XXXXXXXXXXXXX
- c) I will know that I learned it when I am able to XXXXXXXXXXX

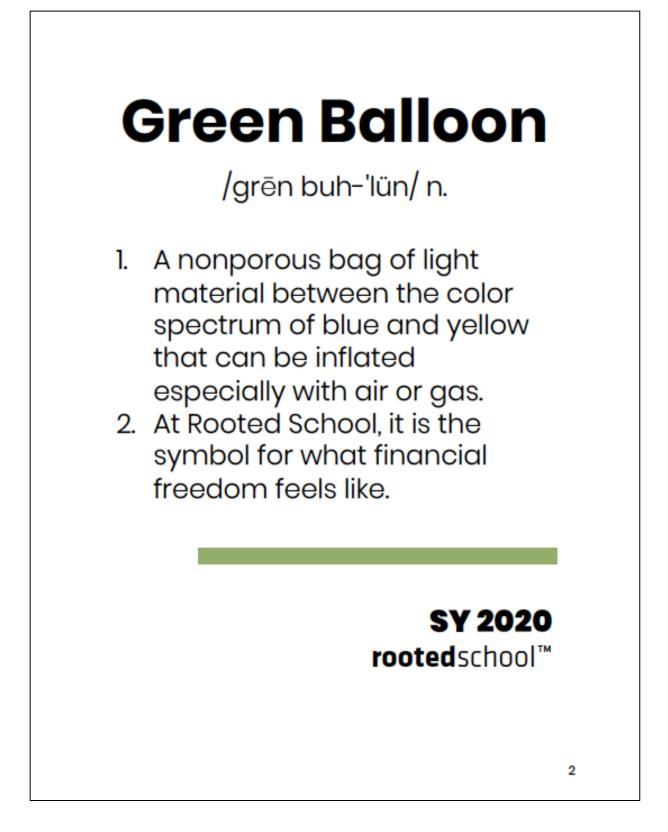
Attachment 12 School Leader Evaluation Instrument

The Green Balloon Fellowship (GBF) is the school leader training module associated with Rooted School's branding. It is intended to develop a school leader's ability to run and operate a Rooted School and is designed to work in concert with Rooted School's Foundations in School Leadership Training *M*odule that is aligned to the Professional Standards for Educational Leaders (formerly known as the Interstate School Leaders Licensure Consortium or ISLLC) developed by the National Policy Board for Educational Leaders.

Green Balloon Fellowship

THE GUIDEBOOK FOR LAUNCHING AND LEADING A ROOTED SCHOOL

SY 2020 rootedschool™





- 1. Complete Green Balloon Fellowship Modules
- 2. Refine our approach to campus and leader shadowing
- 3. Write the charter and secure approval
- 4. Complete goals on your customized professional development plan
- 5. Collaborate (as needed) on projects that accelerate us towards our mission

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Modules

/the rooted way/

Closing "228": Our Compass	5
Deliberately Developmental Leadership	7
School Environment as a Garden	9
The Instructional Model	11
Keeping Rooted School a Rooted School	13
World Class Operations	15
Rooted School Charter Application	17

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Closing "228"

Two hundred and twenty-eight years. That's how long it would take for Blacks to accumulate the same amount of wealth as Whites have now if current policies remain in place.

We believe schools can be the source for laying the groundwork to change this.

Rooted School aims to lay the groundwork for closing "228" in our students' lifetimes.

One way we're measuring this is by becoming the United States' leading placer of teens into the tens and thousands of jobs opening in their communities over the next decade and beyond that provide a family-sustaining wage.

You can build this future with us.

It won't be easy. It may not be fun.

But we hope you'll do it anyway.

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Closing "228"

Playlist:

Link here.

Deliverables:

- Deliver your stakeholder pitch to: a potential parent, a potential teammate, a potential Board Member, a student recruitment partner
- Ever-Growing Gap reflection
- Building a Legacy reflection
- Reciting Rooted School's mission and values from heart
- Complete (3) Scorecard check-ins with your coach that you lead
- Complete (3) Scorecard check-in Shadow Forms of CEO/School Leader check-in
- Complete (3) Rooted School Shadow Forms for each of the protocols above that keep our team on track towards Rooted's goals
- Signed commitment form adhering to Rooted School's brand guidelines

Bonus Materials:

Wealth Gap Toolkit

Deliberately Developmental Leadership

Deliberately Developmental Leadership stems from the structure known as a Deliberately Developmental Organization (DDO). This is how our organizational culture is run.

A DDO is based on the following premise. Most people spend their lives working two jobs. The job they were hired to do and the job of hiding or organizational politics. Structures within a DDO are designed to eliminate the need to hide so that most of a teammate's time is spent doing the job they were brought on the team to do.

DDO's, when executed with fidelity, are typically industry outliers in performance, regardless of sector.

Additionally, a DDO is how we deliver on "enlightened hospitality" to our team. It's not just about running a high-performing school. We believe your success over time will be determined by how your leadership makes others in your school and organization feel.

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Deliberately Developmental Leadership

Playlist:

Link here.

Deliverables:

- Complete Base Camp and The Climb
- Complete DRAFT of Rooted School Hiring Process for your school
- Complete DRAFT of Base Camp and The Climb outlines for your school
- Complete (2) 360° School Leader Evaluations
- Complete (3) Shadow Forms for School-Level Teammate Evaluation and Reflection
- Complete (3) Shadow Forms for Talking Partners
- Complete DRAFT of DDO structures that will be used in your school
- Complete (3) Resistance Plan conversations

School Environment as a Garden

In a 1958 conversation between Spanish artist Joan Miró and critic Yvon Taillandier Miró reflected, "I work like a gardener. Things come slowly. My vocabulary of form for example, I didn't discover it all at once. It forms itself almost in spite of me."

As leaders of a Rooted School, we approach our school environment as gardeners. Starting with anchor texts like *Attachment-Based Teaching*, and carefully curating structures to support the lessons we've learned from them, we've built an environment that provides structure for students that leads to increased freedoms.

Our goal through this module is for you understand why we focus on secure attachments between adults and students and determine steps worth taking to build an environment where everyone feels inspired to take great leaps into the unknown.

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School Environment as a Garden

Playlist:

Link here.

Deliverables:

- Complete DRAFT of a Graduated Discipline Plan for your school
- Complete all school environment-related sections of your charter application

The Instructional Model

Since our founding, we've built our instructional model with our employer partners in mind. Thriving in the workplaces of tomorrow requires a talent pipeline that can:

- · work collaboratively on diverse teams
- solve complex problems amid ambiguity
- adapt with ever-changing needs and rapid technological advances

Our interpretation of a self-directed learning and problem-based learning model is crafted with these needs in mind.

Positioning high school students to meet employer needs will be the most challenging work you and your team do at Rooted.

We haven't hit the mark yet. It will be years before your team comes close.

We hope the thrill of climbing this mountain and the possibilities that exist for our kids and communities on the other side are worth it for you.

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The Instructional Model

Playlist:

- Link here.

Deliverables:

 Complete all instructional model—related sections of your charter application with fidelity to Rooted School principles

Keeping Rooted School a Rooted School

Every Rooted School will be positioned towards the same goals:

- laying the groundwork to close "228"
- students are debt free by 30 years old
- college acceptance in one hand, full-time job offer in the other

Since our founding, we've maintained a belief that a core set of model features will accelerate us towards these goals faster.

We also acknowledge that the journey towards these goals may look different across communities we work in partnership with.

This is the tension that will undergird our relationship. Always remember that we trust you in spite of it.

We're also entrusting you to work alongside us in monitoring and refining how your team lives into Rooted School's core design principles within your community.

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Keeping Rooted School a Rooted School

Playlist:

Linke here.

Deliverables:

- Finalize feedback on the Rooted Way for Rooted School—Clark County
- Finalize feedback on Rooted School-Clark County Partnership Form

World Class Operations

Rooted's brand is a <u>Legacy in the Making</u>. This means that we're building structures for the long-term impact we hope to have.

Like many modern legacy brands that have come before us, your role is building an operational infrastructure—supporting our academic core—to deliver on this promise.

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World Class Operations

Playlist:

Link here.

Deliverables:

- Complete operations and finance sections of your charter application with fidelity to Rooted principles
- Hire A-Player founding operations teammate

Rooted School Charter Application

You will be writing our second iteration of a charter application outside Louisiana within four years of our first school's existence.

Make no mistake, this is history we're building together.

If ever you are lost in the process of building this new possible in your community, use this charter as your anchor.

Most of what we build together will spring from this.

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Rooted School Charter Application

Playlist:

Link here.

Deliverables:

- QB writing the charter application
- Be the quarterback for getting the charter approved

The course syllabus for the Foundations of School Leadership module below is part of the GBF training.

FOUNDATIONS OF SCHOOL LEADERSHIP

COURSE OVERVIEW:

There are six *Interstate School Leaders Licensure Consortium (ISLLC)* standards (*highlighted in blue*). Each standard is followed by the knowledge required for the standard, the dispositions or attitudes manifest by the accomplishment of the standard and performances that could be observed by an administrator who is accomplished in the standard.

Each course component will include at least one reading and one task aligned to the particular standard. Please note that some have multiple readings and tasks. The readings were selected as anchor texts to expand your current understanding of the standards and the issues in education they intend to address. The readings are by no means intended as an exhaustive list on any one subject or standard, so feel free to bring other other text-based materials and resources to bear on your coursework.

TASK SUBMISSION:

Tasks will be due at key points throughout the course selected by your administrative mentor and/or immediate supervisor. Please adhere to those designated deadlines. All course work is to be submitted as a pdf. with the following file name format:

last name-ISLLC Standard-task number Example: ingargiola-1-1

ISLLC STANDARD 1:

A school administrator is an educational leader who promotes the success of all students by facilitating the development, articulation, implementation, and stewardship of a vision of learning that is shared and supported by the school community.

Knowledge:

The administrator has knowledge and understanding of:

- Learning goals in a pluralistic society
- The principles of developing and implementing strategic plans systems theory information sources, data collection, and data analysis strategies
- Effective communication
- Effective consensus-building and negotiation skills

Dispositions:

The administrator believes in, values, and is committed to:

- The educability of all
- A school vision of high standards of learning continuous school improvement
- The inclusion of all members of the school community ensuring that students have the knowledge, skills, and values needed to become successful adults
- A willingness to continuously examine one's own assumptions, beliefs, and practices doing the work required for high levels of personal and organization performance

Performances:

- The vision and mission of the school are effectively communicated to staff, parents, students, and community members
- The vision and mission are communicated through the use of symbols, ceremonies, stories, and similar activities
- The core beliefs of the school vision are modeled for all stakeholders
- The vision is developed with and among stakeholders
- The contributions of school community members to the realization of the vision are recognized and celebrated
- Progress toward the vision and mission is communicated to all stakeholders
- The school community is involved in school improvement efforts
- The vision shapes the educational programs, plans, and actions
- An implementation plan is developed in which objectives and strategies to achieve the vision and goals are clearly articulated
- Assessment data related to student learning are used to develop the school vision and goals
- Relevant demographic data pertaining to students and their families are used in developing the school mission and goals
- Barriers to achieving the vision are identified, clarified, and addressed
- Needed resources are sought and obtained to support the implementation of the school mission and goals
- Existing resources are used in support of the school vision and goals
- The vision, mission, and implementation plans are regularly monitored, evaluated, and revised

Mission, Vision & Goal Setting

This course component will serve as an introduction to establishing a vision that aligns to the over-arching mission of the organization. The vision should be concise and easy to recall, whereas the mission is lengthier and more explanatory in nature.

<u>READING</u>: How to Help Your School Thrive Without Breaking the Bank John G. Gabriel and Paul C. Farmer

Chapter 2 - Developing a Vision and a Mission

TASK 1: Vision, Mission & Goal Setting

In this, your first task, create a one-page vision (concise and memorable) and mission (explanatory and detailed) for your school.

Be sure to include:

- a) A clearly, succinctly stated vision statement that should be able to live on your letterhead.
- b) How your <u>mission</u> will live in your school. Remember to include your focus on literacy and numeracy.
- c) A 3 5 step plan to share your vision and mission with key stakeholders, students and faculty
- d) The qualitative <u>and</u> quantitative measures that you plan to use to assess the success of your vision and mission. You may want to look ahead to Standard 2 and the reading, Visible Learning: A Synthesis of Over 800 Meta-Analyses Relating to Achievement

ISLLC STANDARD 2:

A school administrator is an educational leader who promotes the success of all students by advocating, nurturing, and sustaining a school culture and instructional program conducive to student learning and staff professional growth.

Knowledge:

The administrator has knowledge and understanding of:

- Student growth and development
- Applied learning theories
- Applied motivational theories
- Curriculum design, implementation, evaluation, and refinement
- Principles of effective instruction
- Measurement, evaluation, and assessment strategies
- Diversity and its meaning for educational programs
- Adult learning and professional development models
- The change process for systems, organizations, and individuals
- · The role of technology in promoting student learning and professional growth
- School cultures

Dispositions:

The administrator believes in, values, and is committed to:

- Student learning as the fundamental purpose of schooling
- The proposition that all students can learn
- The variety of ways in which students can learn
- Life long learning for self and others
- Professional development as an integral part of school improvement
- The benefits that diversity brings to the school community
- A safe and supportive learning environment
- Preparing students to be contributing members of society

Performances:

- All individuals are treated with fairness, dignity, and respect
- Professional development promotes a focus on student learning consistent with the school vision and goals
- Students and staff feel valued and important
- The responsibilities and contributions of each individual are acknowledged
- Barriers to student learning are identified, clarified, and addressed
- Diversity is considered in developing learning experiences
- Life long learning is encouraged and modeled
- There is a culture of high expectations for self, student, and staff performance
- Technologies are used in teaching and learning
- Student and staff accomplishments are recognized and celebrated
- Multiple opportunities to learn are available to all students

- The school is organized and aligned for success
- Curricular, co-curricular, and extra-curricular programs are designed, implemented, evaluated, and refined
- Curriculum decisions are based on research, expertise of teachers, and the recommendations of learned societies
- The school culture and climate are assessed on a regular basis
- A variety of sources of information is used to make decisions
- Student learning is assessed using a variety of techniques
- Multiple sources of information regarding performance are used by staff and students
- A variety of supervisory and evaluation models is employed
- Pupil personnel programs are developed to meet the needs of students and their families

Daily Lesson Planning & Assessment Data

This course component will help to inform your understanding of assessment data that supports learning in classrooms, schools and districts. The anchor texts, readings and resources were selected to help you better understand how to monitor and evaluate the impact of the instructional program and student learning outcomes. The component will also focus on analyzing assessment data, developing action plans and implementing lesson planning.

<u>READINGS</u>: The Bridge Between Today's Lesson and Tomorrow's

Carol Ann Tomlinson

Visible Learning: A Synthesis of Over 800 Meta-Analyses Relating to Achievement John Hattie

TASK 2:

Using Tomlinson's article, *The Bridge Between Today's Lesson and Tomorrow's* and Hattie's, *Visible Learning* to assess the efficacy of daily teacher planning, design a rubric that can be used to quickly and efficiently assess your teacher's daily lesson planning.

The rubric should include all of the following:

- a) Descriptors at each level of performance in the rubric
- b) A way to assess the nexus between the lesson being taught and the standard being addressed
- c) A way for the evaluator to offer feedback to the teacher on the clarity of that nexus
- d) A space for meaningful teacher feedback

UbD Unit Planning

This course component will help to advance your understanding of unit planning by focusing on the anchor text from *ASCD* along with the resource provided to consistently map curriculum using the four stages outlined below:

Stage 1: Desired Results Stage 2: Assessment Evidence

Stage 3: Learning Plan Stage 4: Reflect & Assess		
READINGS:	Introduction - The Logic of Backward Design ASCD	
TASK 3:	Using the attached Understanding by Design - Unit Planning Template, please complete a unit design (content and subject of your choice) that includes all of the elements in each of the four stages outlined in the template.	
	Stage 1: Desired Results Stage 2: Assessment Evidence Stage 3: Learning Plan Stage 4: Reflect & Assess	
	Maker certain to include specifics where needed, including:	
	 Broad Areas of Learning Cross curricular competencies Learning Outcomes Enduring Understandings Essential Questions (Pivotal in the lesson planning rubric that you are developing for Task 2) Knowledge Skills All assessment evidence Required areas of study Adaptive dimension(s) Instructional approaches Resource based learning Equity and multi-cultural learning 	

ISLLC STANDARD 3

A school administrator is an educational leader who promotes the success of all students by ensuring management of the organization, operations, and resources for a safe, efficient, and effective learning environment.

Knowledge:

The administrator has knowledge and understanding of:

- Theories and models of organizations and the principles of organizational development
- Operational procedures at the school and district level
- Principles and issues relating to school safety and security
- Human resources management and development
- Principles and issues relating to fiscal operations of school management
- Principles and issues relating to school facilities and use of space
- Legal issues impacting school operations
- Current technologies that support management functions

Dispositions:

The administrator believes in, values, and is committed to:

- Making management decisions to enhance learning and teaching
- Taking risks to improve schools
- Trusting people and their judgments
- Accepting responsibility
- High-quality standards, expectations, and performances
- Involving stakeholders in management processes
- A safe environment

Performances:

- Knowledge of learning, teaching, and student development is used to inform management decisions
- Operational procedures are designed and managed to maximize opportunities for successful learning
- Emerging trends are recognized, studied, and applied as appropriate
- Operational plans and procedures to achieve the vision and goals of the school are in place
- Collective bargaining and other contractual agreements related to the school are effectively managed
- The school plant, equipment, and support systems operate safely, efficiently, and effectively
- Time is managed to maximize attainment of organizational goals
- Potential problems and opportunities are identified
- Problems are confronted and resolved in a timely manner
- Financial, human, and material resources are aligned to the goals of schools
- The school acts entrepreneurially to support continuous improvement
- Organizational systems are regularly monitored and modified as needed
- Stakeholders are involved in decisions affecting schools

- Responsibility is shared to maximize ownership and accountability
- Effective problem-framing and problem-solving skills are used
- Effective conflict resolution skills are used
- Effective group-process and consensus-building skills are used
- Effective communication skills are used
- There is effective use of technology to manage school operations
- Fiscal resources of the school are managed responsibly, efficiently, and effectively
- A safe, clean, and aesthetically pleasing school environment is created and maintained
- Human resource functions support the attainment of school goals
- Confidentiality and privacy of school records are maintained

Maintaining Physical Plant to Ensure an Optimal Learning Environment

This course component will inform the ways in which physical dimensions of the school and classroom influence student behavior, attitudes and achievement. It emphasizes translating research into practical guidelines for the design and management of classroom settings, energy consumption, maintenance, school construction, utilization standards and overall financing of capital outlay and debt service.

READINGS:	Planning Guide for Maintaining School Facilities School Facilities Maintenance
	Task Force: National Forum on Education Statistics and the Association of
	School Business Officials International

Chapter 1 – Introduction to School Facilities Maintenance Planning: Why Does Facilities Maintenance Matter?

Chapter 2 – Planning for School Facilities Maintenance

Do School Facilities Affect Academic Outcomes? Mark Schneider

TASK 4:

Using *Planning for School Facilities Maintenance* as an anchor text, design a detailed 12-month schedule for physical plant review, maintenance and development of your current school facility. Make certain to include all of the following in your detailed 12-month plan:

- a) A comprehensive facilities review including, but not limited to classroom/instructional spaces, shared common spaces (e.g. auditorium, gymnasium, faculty/student lounges areas, cafeteria, etc...)
- b) A detailed maintenance and cleaning plan including projected number of employees conducting routine maintenance tasks
- c) A specialty events set-up and cleaning schedule (e.g. Back-to-School Night, Parent-Teacher Conferences, NHS Induction Ceremonies, Graduation, etc...)
- d) Budgeting for furniture and other potential capital outlay related to facilities

Maintaining a comprehensive school budget is crit component will inform and advance your understand	
 Proper allocation of funds ensuring strong academic outcomes GAAP (see resource below) Application of site-based budgeting to core curriculum standards Comprehensive review of the basic accounting cycle Internal administrative and accounting controls READINGS / RESOURCES: https://www.acc 	 Bond financing Payroll Purchasing procedures Capital outlay Management Information Systems Risk management Food service Transportation Maintenance and Facilities
this end, you have been provided as doc.) and a Budget Build Worksheet should act as your guides. All of the easier for you to complete. Be sure of the information that would be nee superintendent and/or board. Take n	ng a mock budget for the upcoming school year. set of <i>Budget Build Instructions</i> (see attached W t (see attached Excel spreadsheet). These docume information is outlined in the instructions to mak to follow the instructions carefully and to include ded to gamer final approval from your central off ote of the prior year's total budget allotment for e laget cycle 2019, you may not exceed a total incre
Personnel Administra	ation and Supervision
The understanding of human resources associated wi is critical. This standard emphasizes the foundations resource management. This course component will policies as well as employee retention and termination	of evaluation, human capital onboarding and hum inform and advance your understanding of person
 Collective Bargaining Tenure Affirmative Action Recruitment & Retention On-Boarding Procedures & Protocol 	 Teacher Evaluation FERPA ESSA Teacher Termination Legal Parameters
HTTP://WWW.EEOC.GOV HTTPS://WWW2.ED.GOV/POLICY/GEN/	ACHERS-UNIONS-AND-COLLECTIVE-BARGAINING/ GUID/FPCO/FERPA/INDEX.HTML URCES/INCLUSION/TITLE-IX-FREQUENTLY-ASKED-QUESTIONS

	Recruitment, Interviewing, Retention & EEOC
theory with a r analysis of form	mponent will serve to develop a better understanding of contemporary organizationa najor focus on behavior in educational organizations. Work will include a comparativ nal organizations including, but not limited to schools. You will examine how the work o ed by the nature of teaching, organizational conditions and educational policy.
READING:	Good to Great Tom Peters
	Chapter 2 - Level 5 Leadership & Chapter 3 - First WhoThen What
<u>TASK 6</u> :	Using <i>Good to Great</i> as an anchor text, design a detailed interview process that you believe will lead to the hire of a teacher candidate who demonstrates all of the key elements of both "professional will" and "personal humility." The goal will of course, be to cultivate that individual into a level 5 - school leader at som juncture.
	The interview process should detail all of the following processes:
	 a) Job description b) Candidate recruitment c) Initial candidate screening d) Design of interview questions e) Design of interview rubric f) Design of interview structure (committee vs. personal) g) Process of candidate final selection h) Appointment i) Onboarding
	Evaluation, Retention & Termination
	Using the resources/readings from Standard 3 as your anchor texts, respond to the following scenario:
t	The physics teacher candidate that you hired in September (using the interview proces hat you developed in Task 6) has demonstrated the following behaviors/outcome hroughout the school year:
	 Repeated pattern of absence (15 Days of a 180 Day School Year) Repeated pattern of lateness (20 Days of a 180 Day School Year) Several of her colleagues report that she has not been to her lunch duty post on a least 4 occasions during the school year Students have reported several incidents of the teacher making inappropriat comments Parents have called your office on at least three occasions during the school year to register various complaints ranging from inappropriate language in class to teaching content outside of the curriculum

ADDITIONAL PERFORMANCE CONSIDERATIONS:

- You have spoken to the teacher informally about some, but not all, of these
 concerns on at least two occasions during the school year.
- Both you and your ASL have conducted a formative evaluation of her teaching. She was rated a 3.5 and a 4.2 respectively (on a 5.0 scale).
- Several of her teacher colleagues, who knew her previously, report that she had been terminated due to poor performance from her previous school. That school gave you a strong reference for her during the interview/hiring process.

RECENT HUMAN RESOURCES CONSIDERATIONS:

- The teacher recently reported to the HR Director that she is pregnant and entering her second trimester.
- The H.R Director further reports that the teacher has been inquiring specifically about due dates around termination notification and "unfair labor practice."

Considering the six options below, please make a decision around your course of action for this teacher:

- 1. Extend the teacher's contract for an additional year.
- Extend the teacher's contract for an additional year with a Corrective Action Plan (CAP).
- 3. Terminate the teacher for cause and outline the rationale for your decision.
- 4. Terminate the teacher as an "At Will Employee" with no rationale for your decision.
- Try to counsel the teacher out of Rooted School in a informal, but confidential, meeting.
- Try to counsel the teacher out of Rooted School with the assistance of your H.R. Director.

Follow the steps that apply:

- 1. Select one (possibly two) of the options above.
- Provide a detailed explanation outlining the steps you took in rendering your final decision.
- In the event that you included a corrective action plan, please provide the fully developed plan for this particular case study.
- 4. Include what you believe to be 2 3 possible outcomes of your final decision.
- What, if any, next steps do you think will be required. Provide an explanation as to why.

ISLLC STANDARD 4:

A school administrator is an educational leader who promotes the success of all students by collaborating with families and community members, responding to diverse community interests and needs, and mobilizing community resources.

Knowledge:

The administrator has knowledge and understanding of:

- Emerging issues and trends that potentially impact the school community
- The conditions and dynamics of the diverse school community
- Community resources
- Community relations and marketing strategies and processes
- Successful models of school, family, business, community, government and higher education partnerships

Dispositions:

The administrator believes in, values, and is committed to:

- Schools operating as an integral part of the larger community
- Collaboration and communication with families
- Involvement of families and other stakeholders in school decision-making processes
- The proposition that diversity enriches the school
- Families as partners in the education of their children
- The proposition that families have the best interests of their children in mind
- Resources of the family and community needing to be brought to bear on the education of students an informed public

Performances:

- High visibility, active involvement, and communication with the larger community is a priority
- Relationships with community leaders are identified and nurtured
- Information about family and community concerns, expectations, and needs is used regularly
- There is outreach to different business, religious, political, and service agencies and organizations
- · Credence is given to individuals and groups whose values and opinions may conflict
- The school and community serve one another as resources
- Available community resources are secured to help the school solve problems and achieve goals
- Partnerships are established with area businesses, institutions of higher education, and community
- Groups to strengthen programs and support school goals
- Community youth family services are integrated with school programs
- Community stakeholders are treated equitably
- Diversity is recognized and valued
- Effective media relations are developed and maintained
- A comprehensive program of community relations is established
- Public resources and funds are used appropriately and wisely
- Community collaboration is modeled for staff
- Opportunities for staff to develop collaborative skills are provided

Collaboration & Responsiveness

This course component will inform the ways in which you build and sustain positive relationships with your colleagues, your students and the larger school community. You will be asked to consider anecdotal evidence/data that can be collected from those you coach as well as those who coach you. The list, albeit not exhaustive, should include:

- Teachers of Core Classes (i.e. English, math, science and social studies)
- Teacher of Non-Core Classes (i.e. technology, physical education and electives)
- Students (across grade levels and demographic)
- Parents (of students across grade levels and demographic)
- Colleagues (administrative certificated and administrative non-certificated)
- Mentors (both informal and formal)
- Board Members (all those who work confidentially with you in professional capacity)
- Funders (all those who work confidentially with you in professional capacity)
- Professional (colleagues from professional school/business networks outside of Rooted)

READING:

TASK 8:

Thanks for the Feedback: The Science and Art of Receiving Feedback Well Douglas Stone & Sheila Heen

Separate Appreciation, Coaching and Evaluation
Three Triggers
Separate Appreciation, Coaching and Evaluation
First Understand
See Your Blind Spots

How to Organize a Town Hall Meeting: A Planning Guide Guide Inc.

Using Thanks for the Feedback: The Science and Art of Receiving Feedback Well and How to Organize a Town Hall Meeting: A Planning Guide, as your anchor texts, respond to the following scenario:

As the School Leader, you have decided to host a community forum using the Town Hall Meeting format (see attachment). The main part of any town hall meeting occurs when the floor is opened up to questions and comments from the audience. Attendees generally present their ideas, voice their opinions and/or ask questions.

In your agenda, you stated that the purpose of the meeting would be to share your vision and mission for Rooted School with the larger community and to begin to establish a professional network, as well as a parent network, designed to:

- Bolster annual enrollment
- Communicate the learning model to industry partners
- Define your vision and mission more explicitly
- Receive feedback from the community about Rooted School

During the course of the *Question and Comments* section of the meeting, several parents of current Rooted School students come to the microphone to report that they believe that the model is "too ambitious" for most students and that their

children are "not learning." These comments seem to change the tenor of the meeting from informational and supportive to accusatory and adversarial. You realize that you have made several mistakes, including:

- Not foreseeing that perhaps some attendees would be in opposition to the vision and mission of Rooted School
- Not coaching your moderator about how to handle this kind of community response
- Allowing public access to an open microphone without some screening mechanism

Using what you have learned about the "three triggers" and the fundamental differences between "appreciation, coaching and evaluation," describe your next steps.

In a carefully crafted document to be distributed to your leadership team, design and outline another Town Hall Meeting making sure to include a planning timeline similar to the one offered in *How to Organize a Town Hall Meeting: A Planning Guide.*

Be sure to include the following:

- A list of planning committee members (professional titles and/or job descriptions)
- Fact sheet regarding community/audience demographics (i.e. characteristics)
- Meeting objective(s) in the form of an agenda (for public distribution)
- Meeting format (e.g. panel discussion, open public meeting, media roundtable, invitation only)
- Meeting logistics (i.e. where, when, length of time, sequence of events)
- Press Kit (if applicable)
- Plans for additional coaching to improve communication and avoid the pitfalls from the previous meeting
- A discussion of any meaningful feedback gamered from the previous town hall meeting

Make certain that your script includes at least three recommendations, one of which addresses what <u>you</u> could have done differently to ensure clarity and how <u>you</u> will adjust in future meetings

ISLLC STANDARD 5

A school administrator is an educational leader who promotes the success of all students by acting with integrity, fairness, and in an ethical manner.

Knowledge:

The administrator has knowledge and understanding of:

- The purpose of education and the role of leadership in modern society
- Various ethical frameworks and perspectives on ethics
- The values of the diverse school community
- Professional codes of ethics
- The philosophy and history of education

Dispositions:

The administrator believes in, values, and is committed to:

- The ideal of the common good
- The principles in the Bill of Rights
- The right of every student to a free, quality education
- Bringing ethical principles to the decision-making process
- Subordinating one's own interest to the good of the school community
- Accepting the consequences for upholding one's principles and actions
- Using the influence of one's office constructively and productively in the service of all students and their families
- Development of a caring school community

Performances:

- Examines personal and professional values
- Demonstrates a personal and professional code of ethics
- Demonstrates values, beliefs, and attitudes that inspire others to higher levels of performance
- Serves as a role model
- Accepts responsibility for school operations
- Considers the impact of one's administrative practices on others
- Uses the influence of the office to enhance the educational program rather than for personal gain
- Treats people fairly, equitably, and with dignity and respect
- Protects the rights and confidentiality of students and staff
- Demonstrates appreciation for and sensitivity to the diversity in the school community
- Recognizes and respects the legitimate authority of others
- Examines and considers the prevailing values of the diverse school community
- Expects that others in the school community will demonstrate integrity and exercise ethical behavior
- Opens the school to public scrutiny
- Fulfills legal and contractual obligations
- Applies laws and procedures fairly, wisely, and considerately

Ethical Leadership

This course component will inform the ways in which you build and ensure ethical leadership, transparency and honesty in the organization, in your students and throughout the larger school community.

READINGS:	Principles Ray Dalio
	Radical Truth and Radical Transparency (pp. 308 – 336)
	Take a Whistleblower to Lunch Bob Behn
<u>TASK 9:</u>	Using Ray Dalio's, <i>Principles</i> as your anchor text, respond to the following scenario:
	The instructional team has just received the results back from the most recent round of state testing. The results were poor and would almost guarantee that the school receives a D or F <i>School Performance Score</i> in the upcoming year.
	As Dalio states, "Radical transparency isn't the same as total transparency" (p. 331). He goes on to further explain the differences on pp. 334 – 335. Read these pages carefully. Put together a short, one page paper that addresses the bullet points below. Provide a rationale for each bullet.
	 If you decide to report this information, to whom should you report it (e.g. Board, administrative team, instructional team, parent community, students, all of the above/none of the above)? If you decide not to report this information, provide a rationale as to why not. Should each teacher's results be discussed publically and openly in the interest of radical transparency or is this a time to invoke the privacy privilege? Explain. What will be the stated goal/objective of this meeting? Should there be one?
	Explain.

- · Should this meeting have a written agenda? If so, what would that look like? Should it be distributed publically? If not, why?
- If your decision is to share the information, do you ask your participants for their insights into the results? Do you provide your own insights? Explain.

ISLLC STANDARD 6

A school administrator is an educational leader who promotes the success of all students by understanding, responding to, and influencing the larger political, social, economic, legal, and cultural context.

Knowledge:

The administrator has knowledge and understanding of:

- Principles of representative governance that undergird the system of American schools
- The role of public education in developing and renewing a democratic society and an economically productive nation
- The law as related to education and schooling
- The political, social, cultural and economic systems and processes that impact schools
- Models and strategies of change and conflict resolution as applied to the larger political, social, cultural and economic contexts of schooling
- Global issues and forces affecting teaching and learning
- The dynamics of policy development and advocacy under our democratic political system
- The importance of diversity and equity in a democratic society

Dispositions:

The administrator believes in, values, and is committed to:

- Education as a key to opportunity and social mobility
- Recognizing a variety of ideas, values, and cultures
- Importance of a continuing dialogue with other decision-makers affecting education
- Actively participating in the political and policy-making context in the service of education
- Using legal systems to protect student rights and improve student opportunities

Performances:

The administrator facilitates processes and engages in activities ensuring that:

- The environment in which schools operate is influenced on behalf of students and their families
- Communication occurs among the school community concerning trends, issues, and potential changes in the environment in which schools operate
- There is ongoing dialogue with representatives of diverse community groups
- The school community works within the framework of policies, laws, and regulations enacted by local state, and federal authorities
- Public policy is shaped to provide quality education for students
- Lines of communication are developed with decision makers outside the school community

The Role of Advocacy

This course component will inform the ways in which you present yourself as an advocate for all children within the organization and the larger school community.

READING:	Strategies for Success: A Guidebook for Supporting Students With Disabilities Louisiana Department of Education
	New Data Details Effect of Inclusion on Teaching Time Christina A. Samuels
TASK 10:	Using the above LDOE white paper, Strategies for Success: A Guidebook for Supporting Students With Disabilities, and the article, New Data Details Effect of Inclusion on Teaching Time as your anchor texts, respond to the following scenario:
	You have a twenty-student cohort (25% of your total student population) designated special needs; their classifications range in severity from Dyslexia to ASD. Your school organization is committed to an inclusion model. However, several vocal parents (10 parents representing 15 families) have recently complained to you that they do not want their children in class with special needs students.
	This group of parents is citing constant interruptions to instruction, lowered academic standards, reduction in the overall rigor in the curriculum and unfair grading practices (i.e. special education students receiving higher grades as a result of in-class support personnel and related IEP services) as their precedents. They are standing firm as advocates for the general education population.
	In a 1 -2 page position paper, explain how will you respond to this concern from parents. Make sure to include responses to the following issues:
	 How will you advocate for all of your students including those in the general education population who are bringing this concern to you? What are the possible political ramifications of siding with one advocacy group over another? Do you meet with parents individually or as a group? Explain. Do you bring representatives from both groups together to meet? If so, outline the "ground rules" for that meeting. What are the potential legal ramifications considering IDEA and ADA protections? Based on your professional experiences, design a short reflection (to be distributed publically) outlining your position on inclusion.

School Leader:	XXXXXXX
Evaluators:	Jonathan Johnson
	Frank Ingargiola

Date: January 7, 2021 School Year: 2020 - 2021

There are six standards within the *Interstate School Leaders Licensure Consortium* (ISLLC) Standards. Each standard is followed by the knowledge required for the standard, the dispositions or attitudes manifest by the accomplishment of the standard, and performances that could be observed by an administrator who is accomplished in the standard.

Standard 1: A school administrator is an educational leader who promotes the success of all students by facilitating the development, articulation, implementation, and stewardship of a vision of learning that is shared and supported by the school community.

Knowledge:

The administrator has knowledge and understanding of:

- Learning goals in a pluralistic society
- The principles of developing and implementing strategic plans systems theory information sources, data collection, and data analysis strategies
- Effective communication
- Effective consensus-building and negotiation skills

Dispositions:

The administrator believes in, values, and is committed to:

- The educability of all
- A school vision of high standards of learning continuous school improvement
- The inclusion of all members of the school community ensuring that students have the knowledge, skills, and values needed to become successful adults
- A willingness to continuously examine one's own assumptions, beliefs, and practices doing the work
 required for high levels of personal and organization performance

Performances:

- The vision and mission of the school are effectively communicated to staff, parents, students, and community members
- The vision and mission are communicated through the use of symbols, ceremonies, stories, and similar activities
- The core beliefs of the school vision are modeled for all stakeholders
- The vision is developed with and among stakeholders
- The contributions of school community members to the realization of the vision are recognized and celebrated
- Progress toward the vision and mission is communicated to all stakeholders
- The school community is involved in school improvement efforts
- The vision shapes the educational programs, plans, and actions
- An implementation plan is developed in which objectives and strategies to achieve the vision and goals are clearly articulated

- Assessment data related to student learning are used to develop the school vision and goals
- Relevant demographic data pertaining to students and their families are used in developing the school
 mission and goals
- Barriers to achieving the vision are identified, clarified, and addressed
- Needed resources are sought and obtained to support the implementation of the school mission and goals
- Existing resources are used in support of the school vision and goals
- The vision, mission, and implementation plans are regularly monitored, evaluated, and revised

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Effective Emerging Effective Proficient

Highly Effective

Ineffective

Evaluator Feedback/Evidence: XXXXXX continues to keep student learning at the forefront of all that we do at Rooted School. Teachers and administrative colleagues are routinely provided professional development that is effective and essential to the growth of the model and to student progress. XXXXXX coaches her teachers on a weekly basis offering them feedback in a variety of areas including, but not limited to:

a) Achievement of student goals

b) Progress toward "Quarterly Rocks"

c) Strategies for removing cultural and academic barriers as they relate to both whole group and small group instuction

During her coaching sessions, XXXXXX has been observed offering constructive feedback and modeling strategies to teachers designed to improve and inform their instructional practice. Teachers accept and request her coaching recognizing her expertise in the instructional arena.

School Leader Feedback/Evidence:

Standard 2: A school administrator is an educational leader who promotes the success of all students by advocating, nurturing, and sustaining a school culture and instructional program conducive to student learning and staff professional growth.

Knowledge:

The administrator has knowledge and understanding of:

- Student growth and development
- Applied learning theories
- Applied motivational theories
- Curriculum design, implementation, evaluation, and refinement
- Principles of effective instruction
- Measurement, evaluation, and assessment strategies
- Diversity and its meaning for educational programs
- Adult learning and professional development models
- The change process for systems, organizations, and individuals
- The role of technology in promoting student learning and professional growth
- School cultures

Dispositions:

The administrator believes in, values, and is committed to:

- Student learning as the fundamental purpose of schooling
- The proposition that all students can learn
- The variety of ways in which students can learn
- Life long learning for self and others
- Professional development as an integral part of school improvement
- The benefits that diversity brings to the school community
- A safe and supportive learning environment
- Preparing students to be contributing members of society

Performances:

The administrator facilitates processes and engages in activities ensuring that:

- All individuals are treated with fairness, dignity, and respect
- Professional development promotes a focus on student learning consistent with the school vision and goals
- Students and staff feel valued and important
- The responsibilities and contributions of each individual are acknowledged
- Barriers to student learning are identified, clarified, and addressed
- Diversity is considered in developing learning experiences
- Life long learning is encouraged and modeled
- There is a culture of high expectations for self, student, and staff performance
- Technologies are used in teaching and learning
- Student and staff accomplishments are recognized and celebrated
- Multiple opportunities to learn are available to all students
- The school is organized and aligned for success
- Curricular, co-curricular, and extra-curricular programs are designed, implemented, evaluated, and refined
- Curriculum decisions are based on research, expertise of teachers, and the recommendations of learned societies
- The school culture and climate are assessed on a regular basis
- A variety of sources of information is used to make decisions
- Student learning is assessed using a variety of techniques
- Multiple sources of information regarding performance are used by staff and students
- A variety of supervisory and evaluation models is employed
- Pupil personnel programs are developed to meet the needs of students and their families

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Effective Emerging

Ineffective

- Effective Proficient
- Highly Effective

Evaluator Feedback/Evidence: XXXXXX always focuses her team meetings on student achievement and the over-arching climate and culture of the school. All meeting minutes and agendas are prepared well in advance, and she consistently requests and encourages input into the formation of the agendas from involved stakeholders.

XXXXXX has met with her evaluator(s) several times throughout the year to ensure that she is moving the school toward another successful year as demonstrated by student assessment scores on the LEAP 2025 as well as other key metrics.

It should also be noted that XXXXXX regularly requests input on her leadership performance. She accepts feedback with a strong willingness to grow and develop as a school leader. She can be seen implementing the feedback given to her almost immediately and with a keen interest in personal and professional growth/ development.

XXXXXX has worked closely with the Director of School Culture to ensure that students are routinely celebrated for their academic and social accomplishments. These celebrations have become a regular part of the school culture and have helped students to see that hard work and perseverance are recognized and rewarded.

School Leader Feedback/Evidence:

Standard 3: A school administrator is an educational leader who promotes the success of all students by ensuring management of the organization, operations, and resources for a safe, efficient, and effective learning environment.

Knowledge:

The administrator has knowledge and understanding of:

- Theories and models of organizations and the principles of organizational development
- Operational procedures at the school and district level
- Principles and issues relating to school safety and security
- Human resources management and development
- Principles and issues relating to fiscal operations of school management
- Principles and issues relating to school facilities and use of space
- Legal issues impacting school operations
- Current technologies that support management functions

Dispositions:

The administrator believes in, values, and is committed to:

- Making management decisions to enhance learning and teaching
- Taking risks to improve schools
- Trusting people and their judgments
- Accepting responsibility
- High-quality standards, expectations, and performances
- Involving stakeholders in management processes
- A safe environment

Performances:

- Knowledge of learning, teaching, and student development is used to inform management decisions
- Operational procedures are designed and managed to maximize opportunities for successful learning
- Emerging trends are recognized, studied, and applied as appropriate
- Operational plans and procedures to achieve the vision and goals of the school are in place
- Collective bargaining and other contractual agreements related to the school are effectively managed
- The school plant, equipment, and support systems operate safely, efficiently, and effectively
- Time is managed to maximize attainment of organizational goals

- Potential problems and opportunities are identified
- Problems are confronted and resolved in a timely manner
- Financial, human, and material resources are aligned to the goals of schools
- The school acts entrepreneurially to support continuous improvement
- Organizational systems are regularly monitored and modified as needed
- Stakeholders are involved in decisions affecting schools
- Responsibility is shared to maximize ownership and accountability
- Effective problem-framing and problem-solving skills are used
- Effective conflict resolution skills are used
- Effective group-process and consensus-building skills are used
- Effective communication skills are used
- There is effective use of technology to manage school operations
- Fiscal resources of the school are managed responsibly, efficiently, and effectively
- A safe, clean, and aesthetically pleasing school environment is created and maintained
- Human resource functions support the attainment of school goals
- Confidentiality and privacy of school records are maintained

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Ineffective Effective Emerging Effective Proficient Highly Effective

Evaluator Feedback/Evidence: XXXXXX works to ensure that Rooted School is a safe and secure learning environment at all times. She routinely performs the safety drills required by code and meets with the members of the Leadership Team to ensure that systems are in place to create secure attachments with students and a school where all students and staff feel safe and productive.

As evidence, XXXXXX recently called together a meeting of the organization's leadership to review systems attached to the school response to CDS. This meeting began with a thorough debrief and concluded with a number of relevant recommendations and suggestions for actions steps. This degree of pre-planning, coupled with a willingness to adjust current practice, shows that XXXXXX solicits and accepts alternative perspectives using them to strengthen systems.

School Leader Feedback/Evidence:

Standard 4: A school administrator is an educational leader who promotes the success of all students by collaborating with families and community members, responding to diverse community interests and needs, and mobilizing community resources.

Knowledge:

The administrator has knowledge and understanding of:

- Emerging issues and trends that potentially impact the school community
- The conditions and dynamics of the diverse school community
- Community resources
- Community relations and marketing strategies and processes
- Successful models of school, family, business, community, government and higher education partnerships

Dispositions:

The administrator believes in, values, and is committed to:

- Schools operating as an integral part of the larger community
- Collaboration and communication with families
- Involvement of families and other stakeholders in school decision-making processes
- The proposition that diversity enriches the school
- Families as partners in the education of their children
- The proposition that families have the best interests of their children in mind
- Resources of the family and community needing to be brought to bear on the education of students an
 informed public

Performances:

The administrator facilitates processes and engages in activities ensuring that:

- High visibility, active involvement, and communication with the larger community is a priority
- Relationships with community leaders are identified and nurtured
- Information about family and community concerns, expectations, and needs is used regularly
- There is outreach to different business, religious, political, and service agencies and organizations
- Credence is given to individuals and groups whose values and opinions may conflict
- The school and community serve one another as resources
- Available community resources are secured to help the school solve problems and achieve goals
- Partnerships are established with area businesses, institutions of higher education, and community
- Groups to strengthen programs and support school goals
- Community youth family services are integrated with school programs
- Community stakeholders are treated equitably
- Diversity is recognized and valued
- Effective media relations are developed and maintained
- A comprehensive program of community relations is established
- Public resources and funds are used appropriately and wisely
- Community collaboration is modeled for staff
- Opportunities for staff to develop collaborative skills are provided

Ineffective

Effective Emerging

- Effective Proficient
- Highly Effective

Evaluator Feedback/Evidence: XXXXXX is a highly visible school leader. She has volunteered to cover teachers when short-handed, work with students to improve their skill-set(s) in the mathematics content area, as well as assist in the design and implementation of curriculum in a number of different content areas. She is a presence at all evening events and has often acted as the master of ceremonies for these.

For your professional consideration, attention should be given to the following performance condition -*Credence is given to individuals and groups whose values and opinions may conflict.* Some colleagues have recently voiced concerns that they are not able to provide feedback/critique without meeting with a degree of perceived resistance. Albeit difficult to hear, conflicting opinions often lead to stronger practice and eventually to organizational growth. The credibility of the person offering the feedback as well as the relevance of the feedback must be balanced with the ability to be a welcome receptor of that feedback. School Leader Feedback/Evidence:

Standard 5: A school administrator is an educational leader who promotes the success of all students by acting with integrity, fairness, and in an ethical manner.

Knowledge:

The administrator has knowledge and understanding of:

- The purpose of education and the role of leadership in modern society
- Various ethical frameworks and perspectives on ethics
- The values of the diverse school community
- Professional codes of ethics
- The philosophy and history of education

Dispositions:

The administrator believes in, values, and is committed to:

- The ideal of the common good
- The principles in the Bill of Rights
- The right of every student to a free, quality education
- Bringing ethical principles to the decision-making process
- Subordinating one's own interest to the good of the school community
- Accepting the consequences for upholding one's principles and actions
- Using the influence of one's office constructively and productively in the service of all students and their families
- Development of a caring school community

Performances:

- Examines personal and professional values
- Demonstrates a personal and professional code of ethics
- Demonstrates values, beliefs, and attitudes that inspire others to higher levels of performance
- Serves as a role model
- Accepts responsibility for school operations
- Considers the impact of one's administrative practices on others
- Uses the influence of the office to enhance the educational program rather than for personal gain
- Treats people fairly, equitably, and with dignity and respect
- Protects the rights and confidentiality of students and staff
- Demonstrates appreciation for and sensitivity to the diversity in the school community
- Recognizes and respects the legitimate authority of others
- Examines and considers the prevailing values of the diverse school community
- Expects that others in the school community will demonstrate integrity and exercise ethical behavior
- Opens the school to public scrutiny
- Fulfills legal and contractual obligations
- Applies laws and procedures fairly, wisely, and considerately

	Ineffective
	Effective Emerging
	Effective Proficient
\boxtimes	Highly Effective

Evaluator Feedback/Evidence: XXXXXX is a highly ethical school leader with a strong moral compass that points toward student equity, fairness and justice. Her personal goals have been expressed as:

- a) Offering options for inclusion and growth
- b) Respecting the voices of teammates and students
- c) Enlisting support from students and staff to ensure that all students are being serviced

She has done an admirable job in maintaining a school that fosters a sense of overall health and well-being for every child.

School Leader Feedback/Evidence:

Standard 6: A school administrator is an educational leader who promotes the success of all students by understanding, responding to, and influencing the larger political, social, economic, legal, and cultural context.

Knowledge:

The administrator has knowledge and understanding of:

- Principles of representative governance that undergird the system of American schools
- The role of public education in developing and renewing a democratic society and an economically
 productive nation
- The law as related to education and schooling
- The political, social, cultural and economic systems and processes that impact schools
- Models and strategies of change and conflict resolution as applied to the larger political, social, cultural
 and economic contexts of schooling
- Global issues and forces affecting teaching and learning
- The dynamics of policy development and advocacy under our democratic political system
- The importance of diversity and equity in a democratic society

Dispositions:

The administrator believes in, values, and is committed to:

- Education as a key to opportunity and social mobility
- Recognizing a variety of ideas, values, and cultures
- Importance of a continuing dialogue with other decision makers affecting education
- Actively participating in the political and policy-making context in the service of education
- Using legal systems to protect student rights and improve student opportunities

Performances:

- The environment in which schools operate is influenced on behalf of students and their families
- Communication occurs among the school community concerning trends, issues, and potential changes in the environment in which schools operate

- There is ongoing dialogue with representatives of diverse community groups
- The school community works within the framework of policies, laws, and regulations enacted by local state, and federal authorities
- Public policy is shaped to provide quality education for students
- Lines of communication are developed with decision makers outside the school community

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Ineffective Effective Emerging Effective Proficient

Highly Effective

Evaluator Feedback/Evidence: XXXXX works closely with the supervising authorities in both the Orleans Parish School Board (OPSB) and the Louisiana Department of Education (LDOE). She is frequently a presence at key meetings with both entities and offers to act as a conduit between school and these diverse supervising authorities.

She has a strong understanding of public policy and is able to communicate this critical information to our stake-holders and to a diverse school community, including:

a) Parents

- b) Students
- c) Faculty & Staff
- d) Board Members
- e) State Leadership

LPI[®]: Leadership Practices Inventory[®] JAMES M. KOUZES & BARRY Z. POSNER Individual Feedback Report

Prepared for XXXXXX

April 12, 2021

ROOTED SCHOOL NOLA - SCHOOL LEADER REPORT 2020 - 2021



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Profile for XXXXXXX Rooted School Leadership 2020 - 2021

April 12, 2021

The Five Practices of Exemplary Leadership®

Created by James M. Kouzes and Barry Z. Posner in the early 1980s and first identified in their internationally best-selling book, *The Leadership Challenge*, The Five Practices of Exemplary Leadership approaches leadership as a measurable, learnable, and teachable set of behaviors. After conducting hundreds of interviews, reviewing thousands of case studies, and analyzing more than two million survey questionnaires to understand those times when leaders performed at their personal best, there emerged five practices common to making extraordinary things happen. The Five Practices are:



The Leadership Practices Inventory (IPI) instrument is an essential tool to help you gain perspective into how you see yourself as a leader, how others view you, and what actions you can take to improve your use of The Five Practices, which research has demonstrated, year after year, make for more effective leaders.

ABOUT YOUR LPI REPORT

The LPI measures the frequency of 30 specific leadership behaviors on a 10-point scale, with six behavioral statements for each of The Five Practices. You and the observers you selected rated how frequently you engage in each of these important behaviors associated with The Five Practices. The response scale is:

1-Almost Never	3-Seldom	5-Occasionally	7-Fairly Often	9-Very Frequently
2-Rarely	4-Once in a While	6-Sometimes	8-Usually	10-Almost always

In the following report pages, you'll see your LPI Self (S) responses and your observer responses, which are categorized into Manager (M), Direct Report (D), Co-Worker (C), and Other (O). Observer responses are categorized as "Other" when there are not enough responses in the Direct Report or Coworker categories to preserve observer anonymity. The average observer rating (AVG) is an average of all LPI observer responses including Manager.

RATER ABBREVIATIONS:

M-Manager D-Direct Report C-Co-Worker O-Other S-Self AVG-Average of all Observer Responses	M-Manager	D-Direct Report	C-Co-Worker	0-Other	S-Self	AVG-Average of all Observer Responses
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You requested a total of 10 observers to rate you; of these, 10 have submitted an Observer survey as of report date and are included in your report results.

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LPI INDIVIDUAL REPORT

PAGE 1



Profile for XXXXXXX Rooted School Leadership 2020 - 2021 April 12, 2021

The Five Practices Data Summary

This page summarizes your LPI responses for each leadership Practice. The Self column shows the total of your own responses to the six behavioral statements about each Practice. The Individual Observers columns show the total of each Observer's six responses for the Practice. The AVG column shows the average of all your Observers' total responses. Total responses for each Practice can range from 6 to 60; which represents adding up the response score (ranging from 1-Almost Never to 10-Almost Always) for each of the six behavioral statements related to that practice.

	SELF	ELF AVG INDIVIDUAL OBSERVERS											
<u>.</u>			M1	D1	D2	D3	D4	D5	D6	D7	D8	01	
Model the Way	47	52.9	49	53	52	48	59	60	57	54	60	37	
Inspire a Shared Vision	47	53.4	43	56	47	52	53	60	56	54	60	53	
Challenge the Process	47	52.1	51	51	46	49	52	60	57	54	60	41	
Enable Others to Act	54	54.3	52	55	55	51	56	60	59	54	60	41	
Encourage the Heart	51	56.1	44	60	56	52	53	60	58	58	60	60	

M-Manager	D-Direct Report	C-Co-Worker	O-Other	S-Self	AVG-Average of all Observer Responses

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LPI INDIVIDUAL REPORT

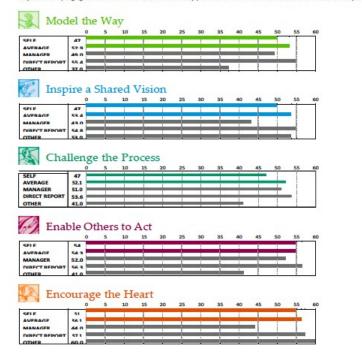


Profile for XXXXXXXX

Rooted School Leadership 2020 - 2021 April 12, 2021

The Five Practices Bar Graphs

These bar graphs, one set for each leadership Practice, provide a graphic representation of the numerical data recorded on The Five Practices Data Summary page. By Practice, it shows the total response for Self and the average total for each category of Observer. Average refers to the average for all categories of Observers (including Manager). Total responses can range from 6 to 60; which represents adding up the response score (ranging from 1-Almost Never to 10-Almost Always) for each of the six behavioral statements related to that practice.

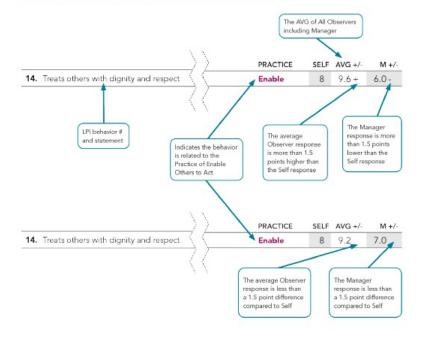




Profile for XXXXXXXX Rooted School Leadership 2020 - 2021 April 12, 2021

Leadership Behaviors Ranking

The following page shows the ranking, from most frequent to least frequent, of all 30 leadership behaviors based on the average of your Observers' responses. The average (AVG) includes the Manager response, which is also shown separately. Horizontal lines separate the 10 most and the 10 least frequent behaviors from the middle 10. A plus sign (+) next to the AVG or Manager (M) response indicates that the response is more than 1.5 points higher than your Self response; a minus sign (-) indicates that the response is more than 1.5 points lower than your Self response. Since 1.5 is approximately the average difference between self and observer scores, any difference greater than that merits attention. When the +/- column is blank in a given row, this indicates a reasonable degree of agreement between the SELF and AVG or SELF and MANAGER scores. The response scale runs from 1-Almost Never to 10-Almost Always.



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Profile for XXXXXXXX

Rooted School Leadership 2020 - 2021 April 12, 2021

MO	ST FREQUENT	PRACTICE	SELF	AVG +/-	M+/-
5.	Praises people for a job well done	Encourage	9	9.7	9.0
30.	Gets personally involved in recognizing people and celebrating accomplishments	Encourage	9	9.5	8.0
27.	Speaks with genuine conviction about the higher meaning and purpose of our work	Inspire	10	9.4	8.0 -
14.	Treats people with dignity and respect	Enable	9	9.4	9.0
15.	Makes sure that people are creatively recognized for their contributions to the success of our projects	Encourage	8	9.4	7.0
4.	Develops cooperative relationships among the people he/she works with	Enable	10	9.3	10.0
10.	Makes it a point to let people know about his/her confidence in their abilities	Encourage	9	9.3	8.0
18.	Asks "What can we learn?" when things don't go as expected	Challenge	7	9.3 +	7.0
19.	Involves people in the decisions that directly impact their job performance	Enable	9	9.2	8.0
1.	Sets a personal example of what he/she expects of others	Model	8	9.2	8.0
20.	Publicly recognizes people who exemplify commitment to shared values	Encourage	8	9.2	7.0
25.	Tells stories of encouragement about the good work of others	Encourage	8	9.0	5.0 -
24.	Gives people a great deal of freedom and choice in deciding how to do their work	Enable	9	8.9	8.0
6.	Makes certain that people adhere to the principles and standards that have been agreed upon	Model	8	8.9	8.0
7.	Describes a compelling image of what our future could be like	Inspire	8	8.9	7.0
11.	Follows through on promises and commitments he/she makes	Model	8	8.9	8.0
17.	Shows others how their long-term interests can be realized by enlisting in a common vision	Inspire	8	8.9	5.0 -
28.	Takes initiative in anticipating and responding to change	Challenge	8	8.9	9.0
29.	Ensures that people grow in their jobs by learning new skills and developing themselves	Enable	8	8.9	8.0
2.	Talks about future trends that will influence how our work gets done	Inspire	7	8.9 +	8.0
13.	Actively searches for innovative ways to improve what we do	Challenge	9	8.8	9.0
12.	Appeals to others to share dream of the future	Inspire	8	8.8	8.0
16.	Asks for feedback on how his/her actions affect other people's performance	Model	7	8.7 +	9.0
9.	Actively listens to diverse points of view	Enable	9	8.6	9.0
21.	Builds consensus around a common set of values for running our organization	Model	8	8.6	8.0
26.	Is clear about his/her philosophy of leadership	Model	8	8.6	8.0
22.	Paints the "big picture" of what we aspire to accomplish	Inspire	6	8.5 +	7.0
3.	Seeks out challenging opportunities that test his/her own skills and abilities	Challenge	9	8.4	9.0
8.	Challenges people to try out new and innovative ways to do their work	Challenge	8	8.4	9.0
23.	Identifies measurable milestones that keep projects moving forward	Challenge	6	8.3 +	8.0

LPI 360

Profile for XXXXXXX

Rooted School Leadership 2020 - 2021 April 12, 2021



Model the Way Data Summary
Clarify values by finding your voice and affirming shared values
Set the example by aligning actions with shared values

This page shows the responses for each of the six leadership behaviors related to this Practice. The Self column shows the responses you gave yourself for each behavior. The AVG column shows the averages of the Observers responses. The Individual Observers columns show each Observers response for each behavioral Item. Responses can range from 1-Almost Rever to 10-Almost Always.

9.2	M1 8 8	D1 10 9	D2 9	D3 9	D4 10	D5 10	D6 10	D7 9	D8 10	7
								9	10	7
8.9	8	9	9	8	10					
2						10	8	9	10	8
8.9	8	8	9	8	10	10	9	8	10	9
8.7	9	8	10	6	9	10	10	10	10	5
8.6	8	8	8	8	10	10	10	9	10	5
8.6	8	10	7	9	10	10	10	9	10	3
	8.6	8.6 8	8.6 8 8	8.6 8 8 8	8.6 8 8 8 8	8.6 8 8 8 8 10	8.6 8 8 8 8 10 10	8.6 8 8 8 8 10 10 10	8.6 8 8 8 8 10 10 10 9	8.6 8 8 8 8 10 10 10 9 10

	2-Rarel	y 4-Onc	e in a While	6-Sometime	es 8-Usually	10-Almost alway
M-Manager	D-Direct Report	C-Co-Worker	O-Other	S-Self	AVG-Average of all O	bserver Responses

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Inspire a Shared Vision Bar Graphs

Envision the future by imagining exciting and ennobling possibilities Enlist others in a common vision by appealing to shared aspirations

The set of bar graphs for each of the six leadership behaviors related to this Practice provides a graphic representation of your and your Observers' average responses for that behavior. By behavior, it shows the response for Self and the average response for each category of Observer. Average refers to the average response for all categories of Observers (including Manager). Responses can range from 1-Almost Never to 10-Almost Always.

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	-	0	1	2	3	4	5	6	7	8	9	1
. Talks about future trends that will	AVG	8.9	1	1		1	-	1			_	
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	M	8.0	1									
	ő	9.0									_	
	0	3.0			-		1	ti.	1	t.	-	-
	· · · ·	0	1	2	3	4	5	6	7	8	9	
Describes a compelling image of	5	8		1			1	-		1	1	
what our future could be like	AVG	8.9										
	D	9.0				1				1		
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		0	1	2	3	4	5	6	7	8	9	1
2. Appeals to others to share dream of	2	•		1	1	1					1	-
2. Appeals to others to share dream or the future	AVG	8.8										
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 Shows others how their long-term interests can be realized by enlisting in a common vision 	AVG D M O	8 8.9 9.3 5.0 10.0	1	2	3	4	-	6	7		2	
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2. Paints the "big picture" of what we	AVG	8.5		-		_		_		-		
aspire to accomplish	D	9.0										
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· ····································	5	10	1	1	1	1	1	1	1	1	1	-
7. Speaks with genuine conviction	AVG	9.4			-							
about the higher meaning and	D	9.6										
purpose of our work	M	8.0									- i	
	0	9.0	-				ł.		1	-	_	÷
RESPONSE SCALE 1-Almost N	ever	3-Selde	om	-	5-Occa	sionally	7-	Fairly Oft	en	9-Very	Freque	ent
RESPONSE SCALE 2- Rarely		4-Once	in a Whi	lle	6-Some	etimes	8-	Usually		10-Alm	nost alw	ay
M-Manager D-Direct Report	C-Co-We	rker	0-00	har	S-Self		G Ave	rage of a	I Obre	Prover Ber	nonter	-
monader D-Direct Neport		a south	0.00	-	3-361	AV	C-ANE	age of a		an west roes	growthers	

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Profile for XXXXXXX

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Challenge the Process Data Summary

Search for opportunities by seizing the initiative and by looking outward for innovative ways to improve Experiment and take risks by constantly generating small wins and learning from experience

This page shows the responses for each of the six leadership behaviors related to this Practice. The Self column shows the responses you gave yourself for each behavior. The AVG column shows the averages of the Observers responses. The Individual Observers columns show each Observers response for each behavioral item. Responses can range from 1-Almost Never to 10-Almost Always.

	SELF	AVG	INDIVIDUAL OBSERVERS										
			M1	D1	D2	D3	D4	D5	D6	D7	D8	01	
 Seeks out challenging opportunities that test his/her own skills and abilities 	9	8.4	9	9	6	9	8	10	9	8	10	6	
 Challenges people to try out new and innovative ways to do their work 	8	8.4	9	8	7	7	7	10	9	9	10	8	
13. Actively searches for innovative ways to improve what we do	9	8.8	9	9	7	8	10	10	9	9	10	7	
 Asks "What can we learn?" when things don't go as expected 	7	9.3	7	9	9	10	8	10	10	10	10	10	
23. Identifies measurable milestones that keep projects moving forward	6	8.3	8	7	9	6	9	10	10	9	10	5	
28. Takes initiative in anticipating and responding to change	8	8.9	9	9	8	9	10	10	10	9	10	5	
1-Ain 2-Rai	nost Ne rely	ver	3-Sek 4-One	form te in a l	While		Occasio			airly Of	ten		y Frequent nost alway
M-Manager D-Direct Report	c	-Co-Wo	rker	0-	Other	s	Self	AV	5-Avera	ge of a	II Obse	rver Re	sponses

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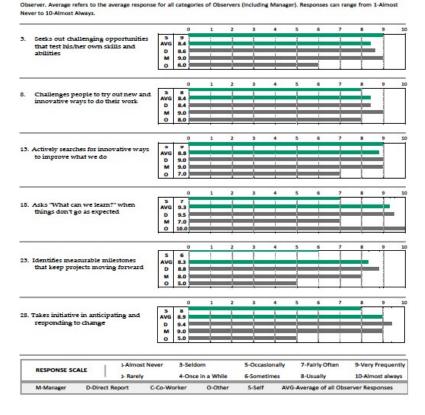
Rooted School Leadership 2020 - 2021 April 12, 2021



Challenge the Process Bar Graphs

Search for opportunities by seizing the initiative and by looking outward for innovative ways to improve
 Experiment and take risks by constantly generating small wins and learning from experience

The set of bar graphs for each of the six leadership behaviors related to this Practice provides a graphic representation of your and your Observers' average responses for that behavior. By behavior, it shows the response for Self and the average response for each category of



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Profile for XXXXXXXX

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Enable Others to Act Data Summary Foster collaboration by building trust and facilitating relationships

Strengthen others by increasing self-determination and developing competence

This page shows the responses for each of the six leadership behaviors related to this Practice. The Self column shows the responses you gave yourself for each behavior. The AVG column shows the averages of the Observers responses. The Individual Observers columns show each Observers response for each behavioral Item. Responses can range from 1-Almost Never to 10-Almost Always.

		SELF	AVG			IN	DIVI	DUAL	OBSE	BSERVERS				
	-			M1	D1	D2	D3	D4	D5	D6	D7	D8	01	
Develops cooperative relationships among t people he/she works w		10	9.3	10	10	9	8	10	10	10	10	10	6	
Actively listens to div points of view	erse	9	8.6	9	8	10	8	7	10	10	9	10	5	
 Treats people with dign respect 	nity and	9	9.4	9	10	9	10	10	10	10	9	10	7	
9. Involves people in the decisions that directly their job performance	impact	9	9.2	8	9	8	9	10	10	10	9	10	9	
 Gives people a great de freedom and choice in deciding how to do th 		9	8.9	8	9	10	8	10	10	9	8	10	7	
 Ensures that people gri their jobs by learning skills and developing themselves 		8	8.9	8	9	9	8	9	10	10	9	10	7	
	1-Alm 2-Rar	nost Ner rely	wer	3-Selo 4-Onc	lom e in a \	While		Occasion			irly Of sually	ten		y Frequen
M-Manager D-Direct Report C-Co-Wo		rker	er O-Other S-Self AV			AVO	AVG-Average of all Observer Re			sponses				

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Profile for XXXXXXXX

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Enable Others to Act Bar Graphs

Foster collaboration by building trust and facilitating relationships
 Strengthen others by increasing self-determination and developing competence

The set of bar graphs for each of the six leadership behaviors related to this Practice provides a graphic representation of your and your Observers' average responses for that behavior. By behavior, it shows the response for Self and the average response for each category of Observer. Average refers to the average response for all categories of Observers (including Manager). Responses can range from 1-Almost Never to 10-Almost Always.

-		_	0	1	2	3	4	5	6	7	8	9	
1.	Develops cooperative relationships	3	10	-	-	_	-	-	-	_	_	-	_
	among the people he/she works with	AVG	9.3	-			-		-		_		
	anong the people metale works what	D	9.6							_		_	
		M	10.0	_				_	-	_	_		
		0	6.0							1	1	1	
			0	1	2	3	4	5	6	7	8	9	8
	Actively listens to diverse points of	5	9										
	view	AVG	8.6	-									
		D	9.0				690	-		-			
		M	9.0			_							
		0	5.0	+		-		-			-	-	_
	CARLES CONTRACTOR CONTRACT		0	1	2	3	4	5	6	7	8	9	
	Treats people with dignity and	>	9			1							
	respect	AVG	9.4	- 1									
	respect	D	9.8										
		M	9.0	1									
		0	7.0	-	1	_				-i-	-	- 1	_
			0	1	2	3	4	5	6	7	8	9	
	involves people in the decisions that	5	9										
directly impact their job performance		AVG	9.2										
	unecuy impact then job performance	D	9.4	1								_	
		M	8.0	Т									
		0	9.0		-		÷.	-)			•	-	_
			0	1	2	3	4	5	6	7	8	9	N
	Gives people a great deal of freedom	2	2										
•	and choice in deciding how to do	AVG	8.9	1									
	their work	D	9.3	1	-		1	1	1				
	LIEL WOLK	M	7.0	1					1			- 1	
		0	/.0	÷	1	-	1	-	÷		-	1.	-
			0	1	2	3	4	5	6	7	8	9	
	Ensures that people grow in their	5	8							1		_	
•		AVG	8.9										
	jobs by learning new skills and developing themselves	D	9.3							1			
	according memberves	M	7.0										
		0	7.0	÷	10	÷.	<u>, 1</u>	1	t.	-	-6-	1.	_
	- 1-Almost New	ver	3-Seldo	m	_	5-Occa	sionally	7-	Fairly Of	ten	9-Verv	Freque	ent
	RESPONSE SCALE 2- Rarely		4-Once	in a Wh	lle	6-Some			Usually			nost alw	
	3- Rarely 4-One M-Manager D-Direct Report C-Co-Worker				ber	S-Self	COLUMN TWO IS NOT	Concession in which the	COLUMN TWO IS NOT		rver Res	VALUE AND DESCRIPTION OF	

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ncourage the Heart Data Summary Recognize contributions by showing appreciation for individual excellence

Celebrate the values and victories by creating a spirit of community

This page shows the responses for each of the six leadership behaviors related to this Practice. The Self column shows the responses you gave yourself for each behavior. The AVG column shows the averages of the Observers responses. The Individual Observers columns show each Observers response for each behavioral item. Responses can range from 1-Almost Never to 10-Almost Always.

		SELF	AVG			IN	DIVI	DUAL	OBSE	RVER	s			
-				M1	D1	D2	D3	D4	D5	D6	D7	D8	01	
i. Praises peopl done	e for a job well	9	9.7	9	10	9	9	10	10	10	10	10	10	
0. Makes it a poir know about 1 confidence in		9	9.3	8	10	8	9	9	10	10	9	10	10	
	t people are ognized for their to the success of	8	9.4	7	10	10	9	8	10	10	10	10	10	
0. Publicly recog who exempli to shared val	y commitment	8	9.2	7	10	9	8	9	10	9	10	10	10	
5. Tells stories of encourageme good work of	nt about the	8	9.0	5	10	10	8	9	10	9	9	10	10	
0. Gets personally recognizing p celebrating a		9	9.5	8	10	10	9	8	10	10	10	10	10	
	1-Air 2-Ra	nost Ne rely	ver	3-Sek 4-One	dom se in a \	While		Occasio			airly Of sually	ten		y Frequen
M-Manager	M-Manager D-Direct Report C-Co-Wo			rker	0-	O-Other S-Self AV			AVG-Average of all Observer Responses			sponses		

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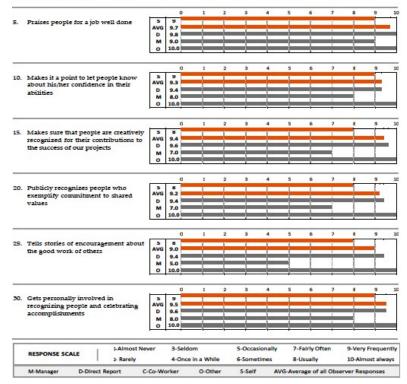
Profile for XXXXXXXX

Rooted School Leadership 2020 - 2021 April 12, 2021

Encourage the Heart Bar Graphs

Recognize contributions by showing appreciation for individual excellence
 Celebrate the values and victories by creating a spirit of community

The set of bar graphs for each of the six leadership behaviors related to this Practice provides a graphic representation of your and your Observers' average responses for that behavior. By behavior, it shows the response for Self and the average response for each category of Observer, Average refers to the average response for all categories of Observers (including Manager). Responses can range from 1-Almost Never to 10-Almost Always.



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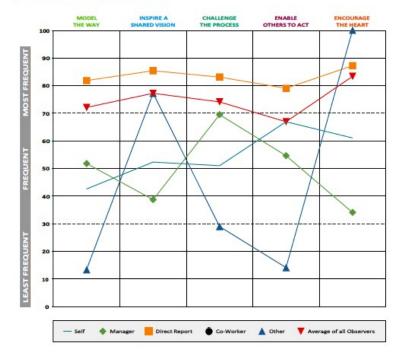
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Percentile Ranking

The leaders and observers who make up the LPI database include a mix of males and females at all levels, from all types of organizations, and from all over the world. This page compares your Self responses and those of your Observers to all Observer responses for other leaders who have taken the LPI. The horizontal lines at the 30th and 70th percentiles divide the graph into three segments, roughly approximating a normal distribution of scores. Each line on the graph shows what percentile your Self or an Observer category response fails into for each Practice. For example, if your Self score for Model the Way is at the 50th percentile, half of the leaders in the database were rated higher by their Observers on the Practice, and half were rated lower.



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Attachment 13 Evidence of Demand

COMMUNITY STUDENT INTEREST:

1	Timestamp	First Name Last Name / Nombre Apellido	With which race do you identify?/Con que raza te identificas?	Email address/Dirección de correo electrónico	Street Address/Dirección	Phone number/Número de teléfono	Middle School Attended/Asistió a la escuela secundaria
2	2/23/2021 9:21:30				89156		No
3	2/24/2021 18:56:34				74133		No
4	2/25/2021 13:22:57				89141		Yes
5	2/25/2021 17:48:18				89044		No
6	3/18/2021 15:32:11				89106		No
7	3/18/2021 16:12:31				89149		No
8	3/18/2021 16:37:48				89032		Yes
9	3/18/2021 16:53:54				89032		No
10	3/18/2021 17:03:36				89032		Yes
11	3/18/2021 17:10:16				89104		No
12	3/18/2021 17:28:40				89018		No
13	3/18/2021 17:37:33				890106		No
14	3/18/2021 17:51:02				89032		Yes
15	3/20/2021 13:49:56				89142		No
16	3/22/2021 11:50:53				89032		I am unable to answer at this time
17	3/22/2021 11:54:06	•			89032		No
18	3/22/2021 11:58:17				89032		Yes
19	3/22/2021 12:01:32				89032		No
20	10/29/2021 13:07:27		1				

1	Timestamp	First Name Last Name / Nombre Apellido	With which race do you identify?/Con que raza te identificas?	Email address/Dirección de correo electrónico	Street Address/Dirección	Phone number/Número de teléfono	Middle School Attended/Asistió a la escuela secundaria
21	10/29/2021 13:08:51						Swainston MS
22	10/29/2021 13:09:34						
23	10/29/2021 13:10:22						
24	10/29/2021 13:11:19	-					
25	10/29/2021 13:12:21	-					
26	10/29/2021 13:13:22	-					
27	10/29/2021 13:15:46	-					Pinecrest Sloan Canyon
28	10/29/2021 13:17:29	_					Somerset Losee
29	10/29/2021 13:19:40	_					.egacy Traditional
30	10/29/2021 13:20:25	_					Fertitta Middle School
31	10/29/2021 13:22:34						Piggot Academy
32	10/29/2021 13:24:24						Escobedo
33	10/29/2021 13:26:15						
34	10/29/2021 13:27:20						
35	10/29/2021 13:28:44						Somerset North Las Vegas
36	10/29/2021 13:31:38						

0/29/2021 13:32:34 0/29/2021 13:33:30 0/29/2021 13:34:33 0/29/2021 13:35:25 0/29/2021 13:37:00 0/29/2021 13:38:03						Miley Achievement Somerset North Las Vegas
0/29/2021 13:34:33 0/29/2021 13:35:25 0/29/2021 13:37:00 0/29/2021 13:38:03						Somerset North
0/29/2021 13:35:25 0/29/2021 13:37:00 0/29/2021 13:38:03	-					Somerset North
0/29/2021 13:37:00 0/29/2021 13:38:03	-					
0/29/2021 13:38:03						
11/1/2021 2:28:28						
11/1/2021 9:34:25						
11/1/2021 9:35:30						
11/1/2021 9:36:52						
11/1/2021 9:40:02						silverado
11/1/2021 9:41:27						Lied Stem Academy
11/1/2021 9:43:43						Von Tobel
11/1/2021 9:46:07						Somerset
11/1/2021 9:47:35						
11/1/2021 9:48:14						
11/1/2021 9:52:48						
1/1/2021 10:40:56						
1/1/2021 10:41:46						
	1/1/2021 9:35:30 1/1/2021 9:36:52 1/1/2021 9:40:02 1/1/2021 9:40:02 1/1/2021 9:41:27 1/1/2021 9:43:43 1/1/2021 9:46:07 1/1/2021 9:46:07 1/1/2021 9:48:14 1/1/2021 9:52:48 /1/2021 10:40:56	1/1/2021 2:28:28 1/1/2021 9:34:25 1/1/2021 9:35:30 1/1/2021 9:36:52 1/1/2021 9:40:02 1/1/2021 9:40:02 1/1/2021 9:43:43 1/1/2021 9:44:27 1/1/2021 9:43:43 1/1/2021 9:46:07 1/1/2021 9:47:35 1/1/2021 9:52:48 /1/2021 10:40:56	1/1/2021 2:28:28 1/1/2021 9:34:25 1/1/2021 9:35:30 1/1/2021 9:36:52 1/1/2021 9:40:02 1/1/2021 9:41:27 1/1/2021 9:43:43 1/1/2021 9:43:43 1/1/2021 9:46:07 1/1/2021 9:48:14 1/1/2021 9:52:48 /1/2021 10:40:56	1/1/2021 2:28:28 1/1/2021 9:34:25 1/1/2021 9:35:30 1/1/2021 9:36:52 1/1/2021 9:40:02 1/1/2021 9:41:27 1/1/2021 9:43:43 1/1/2021 9:43:43 1/1/2021 9:46:07 1/1/2021 9:48:14 1/1/2021 9:52:48 1/1/2021 10:40:56	1/1/2021 2:28:28 1/1/2021 9:34:25 1/1/2021 9:35:30 1/1/2021 9:36:52 1/1/2021 9:40:02 1/1/2021 9:41:27 1/1/2021 9:43:43 1/1/2021 9:46:07 1/1/2021 9:48:14 1/1/2021 9:52:48 1/1/2021 10:40:56	1/1/2021 2:28:28 1/1/2021 9:34:25 1/1/2021 9:35:30 1/1/2021 9:36:52 1/1/2021 9:40:02 1/1/2021 9:43:43 1/1/2021 9:43:43 1/1/2021 9:43:43 1/1/2021 9:48:14 1/1/2021 9:52:48

1	Timestamp	First Name Last Name / Nombre Apellido	With which race do you identify?/Con que raza te identificas?	Email address/Dirección de correo electrónico	Street Address/Dirección	Phone number/Número de teléfono	Middle School Attended/Asistió a la escuela secundaria
56	11/1/2021 10:42:43						
57 1	11/1/2021 10:43:41						

NEVADA PREP SCHOOL STUDENT INTEREST:

1	Timestamp	Name	Racial Background	How do you Identify?	Mailing Address	Phone Number	Email Address?	Current Middle School
2	5/27/2021 8:48:59	_		Male				Nevada Prep charter school.
3	5/27/2021 8:52:22			Female				Nevada prep
4	9/21/2021 14:04:37			Male				NV Prep Charter School
5	9/21/2021 14:38:04			Female				Nevada prep
6	9/21/2021 15:15:07			Female				Nevada prep
7	9/21/2021 15:31:48			female				NV Prep
8	9/21/2021 16:26:40			female				Navada Prep
9	9/23/2021 13:18:34			female				Nevada Prep
10	9/29/2021 17:35:37			female				Nevada Prep
11	9/29/2021 17:37:25			Male				NV Prep
12	9/29/2021 17:39:07			female				NV Prep
13	9/29/2021 17:40:32			female				NV Prep
14	9/29/2021 17:43:53			Female				NV Prep
15	9/29/2021 17:45:17	_		Male				NV Prep
16	9/29/2021 17:48:07			Male				NV Prep
17	9/29/2021 17:49:54			Male				NV Prep
18	9/29/2021 18:09:59			female				nv prep

1	Timestamp	Name	Racial Background	How do you Identify?	Mailing Address	Phone Number	Email Address?	Current Middle School
19	9/29/2021 18:11:39			female	-			nv prep
20	9/29/2021 18:12:28	-		female	-			nvprep
21	10/4/2021 12:41:28			female	-			Nevada prep
22	10/4/2021 12:45:33			female	•			nevada prep
23	10/5/2021 12:30:32		Black	Male	•			nvprep 8th
24	10/15/2021 10:52:35		Hispanic/LatinX	Female	~			NV Preparatory
25	10/29/2021 17:11:23	-	Black	Female	~			NV Prep
26	5/27/2021 8:43:33	-		Male	-			NVPREP
27	9/22/2021 9:18:44			female	-			Nevadaprep
28	9/23/2021 17:45:54			Male	-			NV prep
29	9/29/2021 17:51:35			female	-			NV Prep
30	9/29/2021 17:53:59			Female				NV Prep
31	9/29/2021 17:55:55			Female				NV Prep
32	9/29/2021 17:57:26			female				Nv Prep
33	9/29/2021 17:59:40			Female				Nv Prep
34	9/29/2021 18:00:31			Female				NV Prep
35	9/29/2021 18:01:17			Male				NV Prep

1	Timestamp	Name	Racial Background	How do you Identify?	Mailing Address	Phone Number	Email Address?	Current Middle School
36	9/29/2021 18:02:42	-		Female				NV Prep
37	9/29/2021 18:04:21			Female				Nv Prep
38	9/29/2021 18:05:42			Male				nv prep
39	9/29/2021 18:07:11			Female				NV Prep
40	9/29/2021 18:08:33			Male				NV Prep
41	10/14/2021 8:14:51	-	Hispanic/LatinX	Mujer				Nevada Prep

RS-CC will use a multi-pronged recruitment strategy to ensure that families, particularly those that have been systemically undeserved, across Clark County, Nevada and outlying neighborhoods are aware of RS-CC as a potential high school option for their child.

English Language Google Survey

Spanish Language Google Survey

Attachment 14 Incubation Planning Table

ATTACHMENT 14:	NEW INCUBATION YEAR PLANNING TABLE
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INSTRUCTION			
CATEGORY	ACTIVITY	RESPONSIBLE PARTY	MILESTONE DATE
CURRICULUM	Design and/or purchase core content curriculum	 School Leader 	Jan '22 - May '22
	Design technology scope and sequence in concert with RS-CC industry partners	 School Leader 	Jan '22 - May '22
DEVELOPMENT	Purchase curriculum software	 School Leader 	Jan '22 - May '22
	Align curriculum to industry design	 School Leader 	Jan '22 - May '22
	Conduct curriculum alignment with Nevada State Graduation Standards	 School Leader 	Jan '22 - May '22
	PD for Infinite Campus	 Infinite Campus Representati ¥8 	Jan '22 - May '22
ASSESSMENT	Develop WIDA testing schedule and infrastructure	 School Leader 	Jan '22 - May '22
DEVELOPMENT	Develop Special Education testing schedule and infrastructure	 School Leader 	Jan '22 - May '22
	Purchase all testing materials	 School Leader 	Jan '22 - May '22
	ACT/SAT Course Preparation Design and material purchase	 School Leader 	Jan '22 - May '22
	Purchase and order classroom furniture	 Director of Operations School Leader 	Jan '22 - May '22
ACADEMIC PROGRAM DEVELOPMENT	Purchase computer software and hardware	 Director of Operations School Leader 	Jan '22 - May '22
	Design IBC attainment calendar	 School Leader 	Jan '22 - May '22
	Request IEP Records from sending schools	 School Leader 	Jan '22 - May '22
SPECIAL EDUCATION	Review all IEPs for updates, key equator dates and accommodation texisions.	 School Leader 	Jan '22 - May '22
PROGRAM DEVELOPMENT	Hire Director of Student Services	 School Leader 	Jul '22
	Provide SPED PD to all teaching and certificated faculty/staff	 School Leader 	Jul '22
ELL	Request ELL Records from sending	 School 	Apr '22 - May

PROGRAM	schools	Leader	'22
DEVELOPMENT	Review all previous WIDA testing results for students identified as	 School Leader 	Apr '22 - May '22
	Hire ELL Teacher / Teacher Leader	 School Leader 	Jul '22
	Provide ELL PD to all teaching and certificated faculty/staff	School Leader	Jul '22
	PERSONNEL DEVELOP	MENT	
CATEGORY	ACTIVITY	RESPONSIBLE PARTY	MILESTONE DATE
	Develop RS-CC Faculty Handbook	 Director of Operations School Leader 	Now - Authorizing
	Develop RS-CC Student Handbook	 Director of Operations School Leader 	Now - Authorizing
	Finalize salary scale	 Director of Operations School Leader 	Now - Authorizing
POLICY DESIGN & DEVELOPMENT	Finalize benefits & compensation package(s)	 Director of Operations School Leader 	Now - Authorizing
	Review all hiring practices for continuity and compliance with RSF and EEOC	 Director of Operations School Leader 	Now - Authorizing
	Review and/or design all BOD policies and compliance statues	 Director of Operations School Leader 	Now - Authorizing
	Establish BOD sub-committees	 Director of Operations 	Now - Authorizing
	Finalize organizational chart	 Director of Operations School Leader 	Now - Authorizing
	Finalize and approve all job descriptions	 Director of Operations School Leader 	Now - Authorizing
RECRUITMENT & HIRING	Approve all job descriptions with BOD	 Director of Operations School Leader 	Now - Authorizing
Inking	Conduct interviews, background checks and reference checks	 Director of Operations School Leader 	Jan '22 - May '22
	Extend offers / contracts	 Director of Operations School Leader 	Jan '22 - May '22
	Prepare interview committees and performance tasks	 Director of Operations 	Now - Authorizing

		•	School Leader	
	Train members of the interview			Now -
	committees	•	School Leader	Authorizing
	Design and conduct "Basecamp"	•	School Leader	Apr '22 - Jul '22
	Design and conduct "The Climb"	•	School Leader	Jul '22 - Aug '22
	Berner all and another and an and	•	Director of	Now -
	Prepare all onboarding paperwork		Operations	Authorizing
EMPLOYEE ONBOARDING	 PD for all new employees on: AED Administration of Medication 		Director of	
	CPR		Operations	Jul '22
	 School Safety Training 	•	School Leader	ŕ
	 Active Shooter and 			
	Emergency Plan Training			
	CPI Training			
	Prepare all summer PD days	•	School Leader	Apr '22 - Jul '22
	OPERATIONS		ESPONSIBLE	MURCTON
CATEGORY	ACTIVITY	в	PARTY	MILESTONE DATE
	Secure all back-office contracting and	•	Director of	Now -
	finance services		Operations	Authorizing
	Finalize BOD approval on all back	•	Director of	Now -
	office contractors		Operations	Authorizing
	Hire Director of Operations	•	School Leader	Jan '22
	Develop a procurement plan and list of eligible service providers,	•	Director of	Now -
	contractors and		Operations	Authorizing
	Review all purchase bid thresholds			
	and adhere to both state and federal	•	Director of	Jan '22 - Jul'22
BACK OFFICE SUBCONTRACT	guidelines		Operations	
(EdOps)	Set up bank accounts and systems for	•	Director of	Jan '22
(correlat)	deposits, withdrawls and payments		Operations	Jan 22
	Develop a cash flow plan and a cash	•	Director of	Now -
	management plan		Operations	Authorizing
	Develop / design financial reporting	•	Director of	Now -
	templates consistent with GAAP and SPCSA requirements		Operations	Authorizing
	Develop a working multi-year		-	
	presumptive budget that meets with	•	Director of	Now -
	costs consistent with the application		Operations	Authorizing
	budget and financials	•	School Leader	, i i i i i i i i i i i i i i i i i i i
	Solicit bids and secure insurance	•	Director of	Now -
	quotes based on coverage		Operations	Authorizing
INSURANCE		•	Director of	
moonnee	Approve and sign all contracts		Operations	Jan '22 - Jul '22
		•	School Leader	
	Finalize BOD approval on all	•	Director of	

	insurance contracts	Operations	Jan '22 - Jul '22
		Director of	
	Investigate contract for shared nursing services	Operations School Leader	Jan '22 - May '22
	Conduct a facilities inspection to ensure compliance with all fire and building safety regulations relative to school in the State of Nevada	 Director of Operations School Leader 	Jan '22 - May '22
HEALTH, SAFETY	Develop fire drill and emergency evacuation plans related to the specific facility	 Director of Operations School Leader 	Now - Authorizing
& WELLNESS	Develop HIPPA reporting forms and establish a security system for records maintenance and filing	 Director of Operations School Leader 	Now - Authorizing
	Conduct a compliance review for all workplace safety standards relative to schools (OSHA and P-OSHA)	Director of Operations	Now - Authorizing
	Post all appropriate reporting posters in public areas within the school building	Director of Operations	Jun '22
	Purchase first aid supplies and materials for school	 Director of Operations 	Jun '22
	Establish an RFP for meal service in school	 Director of Operations 	Jan '22 - Mar '22
	Review prospective vendor contracts	 Director of Operations 	Jan '22 - Mar '22
	Select a vendor and go through BOD approval process for procurement	 Director of Operations 	Jan '22 - Mar '22
FOOD SERVICE	Complete FRL and FRB forms for all eligible students	 Director of Operations 	Apr '22
	Communicate with parents regarding FRL & FRB sign up and confidentiality	 Director of Operations School Leader 	Jan '22 - Jul '22
	Establish a POS system for all meals served to ensure compliance with FDA regulations	Director of Operations	Now - Authorizing
	Contract with a provider for all IT related services	 Director of Operations School Leader 	Jan '22 - Mar '22
IT & TECHNOLOGY OUTSOURCING	Select an ISP based on careful review of projected usage and cost for a school with high tech capabilities and requirements.	 Director of Operations School Leader 	Jan '22 - Mar '22
	Purchase all fiber optic CAT6 wiring and technology infrastructure (as needed)	 Director of Operations 	Jan '22 - Mar '22

	Set up phone system and communication mechanisms (e.g. Remind) Develop a technology inventory plan for all student and staff tech needs	 Director of Operations Director of Operations School Leader 	Jan '22 - Mar '22 Jan '22 - Mar '22
	Postage Meter and Wireless Printing	Director of Operations	Jan '22 - Mar '22
	Lease copier with wireless and fax capability	 Director of Operations 	Jan '22 - Mar '22
	Purchase Infinite Campus contract and PD package(s)	 Director of Operations 	Jan '22 - Mar '22
	FACILITIES		
CATEGORY	ACTIVITY	RESPONSIBLE PARTY	MILESTONE DATE
FACILITY LEASING	Find a number of possible locations (canvassing) including possible shared locations from which to select a school site	 Director of Operations School Leader 	Now - Authorizing
LADING	Share with BOD and seek formal approval after due diligence	 Director of Operations School Leader 	Jan '22
	Develop a punch list of items to be corrected, remediated or designed	 Director of Operations 	Now - Authorizing
RENOVATION	Begin a timeline for renovations including a budget	 Director of Operations 	Now - Authorizing
PLAN	Request an inspection and secure a C.O. for the designated location	 Director of Operations 	May '22
	Purchase student and teacher furniture	 Director of Operations 	Apr '22 - Jun '22
	PARENT & COMMUNITY END		
CATEGORY	ACTIVITY	RESPONSIBLE PARTY	MILESTONE DATE
	Attend community events	School Leader	Now - Authorizing
ESTABLISHING COMMUNITY	Develop a working list of tech partners	School Leader	Now - Authorizing
PARTNERSHIPS	Begin a "grassroots" student recruitment campaign using the local Chamber of Commerce and Rotary (or support and networking	School Leader	Aug '21
	Contract for translation services	 School Leader 	Aug '21
FAMILY	Host monthly parent forums both sittual and real-time	School Leader	Aug '21
COMMUNICATION & OUTREACH	Develop a monthly RS-CC Parent / Community Newsletter	School Leader	Aug '21
	Host focus group meeting and gather reliable information from surveys	School Leader	Now - Authorizing

	STUDENT RECRUITMENT & EN	ROLLMENT	
CATEGORY	ACTIVITY	RESPONSIBLE PARTY	MILESTONE DATE
	Establish a calendar of events for RS- CC recruitment and public promotion	School Leader	Now - Authorizing
	Contract with a local firm that has developed and managed student recruitment campaigns / strategies	School Leader	Now - Authorizing
	Establish a presence on social media: • Twitter • Instagram • Facebook	School Leader	Now - Authorizing
STUDENT RECRUITMENT	Develop a professional interactive website	School Leader	Complete
	Connect RS-CC website with RSF web; based services	School Leader	Complete
	Draft press releases	School Leader	Now - Authorizing
	Translate all recruitment materials into Spanish and community indigenous languages	School Leader	Now - Authorizing
	Establish a student application process consistent with RSF mission and vision	School Leader	Now - Authorizing
	SCHOOL SYSTEMS & SCHOOL	CULTURE	
CATEGORY	ACTIVITY	RESPONSIBLE PARTY	MILESTONE DATE
	Post and interview for the Dean of School Culture position	School Leader	Jan '22 - Apr '22
	Hire a Dean of School Culture	 School Leader 	Jul '22
	Train faculty and staff on Restorative Practices	School Leader	Jul '22
& DISCIPLINE	Train teaching staff on Trauma Informed Teaching/Instructional Practices	School Leader	Jul '22
	Informed Teaching/Instructional Practices Train staff on the use of the infinite Campus discipline reporting tool	 School Leader School Leader 	Jul '22 Jul '22
& DISCIPLINE	Informed Teaching/Instructional Practices Train staff on the use of the infinite Campus discipline reporting tool Ensure proper federal, state and local guidelines for reporting of discipline, suspension (ISS or OSS) and/or expulsion.		· ·
& DISCIPLINE	Informed Teaching/Instructional Practices Train staff on the use of the infinite Campus discipline reporting tool Ensure proper federal, state and local guidelines for reporting of discipline, suspension (ISS or OSS) and/or	School Leader	Jul '22
& DISCIPLINE	Informed Teaching/Instructional Practices Train staff on the use of the infinite Campus discipline reporting tool Ensure proper federal, state and local guidelines for reporting of discipline, suspension (ISS or OSS) and/or expulsion. GOVERNANCE ACTIVITY	School Leader	Jul '22
& DISCIPLINE REPORTING	Informed Teaching/Instructional Practices Train staff on the use of the infinite Campus discipline reporting tool Ensure proper federal, state and local guidelines for reporting of discipline, suspension (ISS or OSS) and/or expulsion. GOVERNANCE ACTIVITY Transitioning CTF to governing BOD (gr RS-CC	School Leader School Leader RESPONSIBLE	Jul '22 Jul '22 MILESTONE
& DISCIPLINE REPORTING CATEGORY BOARD	Informed Teaching/Instructional Practices Train staff on the use of the infinite Campus discipline reporting tool Ensure proper federal, state and local guidelines for reporting of discipline, suspension (ISS or OSS) and/or expulsion. GOVERNANCE ACTIVITY Transitioning CTF to governing BOD	School Leader School Leader School Leader RESPONSIBLE PARTY	Jul '22 Jul '22 MILESTONE DATE

	Purchase or secure philanthropic funding for the purchase of Board on Track	School Leader	Jan '22
	BOD training on Governance using Board on Track	School Leader	Jan '22
	BOD Retreat	 School Leader 	Jan '22
	Conduct a policy review of Staff & Faculty Handbook and Student & Family Handbook	School Leader	Jan '22 - Mar '22
	Vote for BOD Chairperson, Vice Chairperson and Recording Secretary	School Leader	Jan '22
	Train BOD on Roberts Rules of Order to ensure state and SPCSA compliance	School Leader	Jan '22
	Train BOD on OPMA and OPRA to ensure compliance with all federal, state and local laws, policies and legislation.	School Leader	Jan '22
	Set monthly BOD meeting dates and publish on all appropriate school websites, social media and communication tools	School Leader	Jan '22
	Develop BOD budget approval process and public budget hearing process	School Leader	Now - Authorizing
	Develop BOD monthly packet information sharing	School Leader	Jan '22
	Post all board meeting dates at least 24 hours in advance of meetings	School Leader	Jan '22
	BOARD ON TRACK		
CATEGORY	ACTIVITY	RESPONSIBLE PARTY	Y MILESTONE DATE
	Contract for the purchase of Box.	 Director of Operations 	Dec '21
BOARD ON TRACK	Conduct Bot training for all administration and BOD members	 Director of Operations 	Jan '22
COMMUNICATION TOOL	Complete all required conflict of interest documentation	 Director of Operations 	Jan '22
	Complete all financial disclosure documentation as required by the State of Nevada	 Director of Operations 	Jan '22 - Mar '22
	ADMINISTRATIVE HIR	ING	
CATEGORY	ACTIVITY	RESPONSIBLE PARTY	Y MILESTONE DATE
LEADERSHIP TEAM HIRING	Approve job descriptions: School Leader Director of Operations Director of Student Services 	RSF CEO	Now - Authorizing

	GRANT MANAGEMENT & FUNDRAISING		
CATEGORY	ACTIVITY	RESPONSIBLE PARTY	MILESTONE DATE
PHILANTHROPIC FUNDING & GRANT WRITING	Solidify all fundraising initiatives consistent with RSF guidelines Establish a grant writing team to pursue philanthropic funding and RFP searches	School Leader School Leader	Now - Authorizing Now - Authorizing
WRITING	Create a budget of proposed revenue streams from philaotheopia. funding	School Leader	Now - Authorizing

INCUBATION YEAR MILESTONES			
CATEGORY	ACTIVITY	RESPONSIBLE PARTY	MILESTONE DATE
Founding School Leader named and providing leadership for the school, and other key leadership roles in the school have been filled	Organizational Chart that delineates school-based and network-based personnel	Rooted School–Clark County Board of Directors	February 2022
Founding School Leader named and providing leadership for the school, and other key leadership roles in the school have been filled	Contract(s) and/or offer letters for school leader and key administrators	Rooted School-Clark County Board of Directors	February 2022
Board of Directors established and setting policy direction for the school	Monthly meeting minutes from at least one board meeting between December and July	Rooted School-Clark County Board of Directors	December 2021-July 2022
Board of Directors established and setting policy direction for the school	Copy of board meeting calendar for the upcoming year	Rooted School-Clark County Board of Directors	February 2022
Board of Directors established and setting policy direction for the school	Current resumes for all board members	Rooted School-Clark County Board of Directors	March 2022
Board of Directors established and setting policy direction for the school	Evidence that board training has occurred or is scheduled	Rooted School-Clark County Board of Directors	March 2022
National criminal background checks completed for all current board members	Background check authorization are on file	Rooted School-Clark County Board of Directors	March 2022
Determination of tax-exempt status from the IRS has been received	Letter from IRS documenting tax-exempt status and number	Rooted School–Clark County Board of Directors	June 2022
Board of Directors established and setting direction for the school	Description of the board committee structure	Rooted School-Clark County Board of Directors	July 2022
Board of Directors established and setting policy direction for the school	Copy of current bylaws and board policies	Rooted School–Clark County Board of Directors	July 2022
Board of Directors established and setting policy direction for the school	Documentation of processes for conducting evaluations for school leader	Rooted School-Clark County Board of Directors	July 2022

Board of Directors established and setting policy direction for the school	Documentation process for evaluating CMO	Rooted School-Clark County Board of Directors	July 2022
Board of Directors established and setting policy direction for the school	Documentation process for evaluating the board	Rooted School-Clark County Board of Directors	July 2022
CMO/EMO/ESP Contracts	Contracts with any CMO/EMO or ESP the school plans on utilizing	Rooted School-Clark County Board of Directors	July 2022
Board Communication	Authorizer meeting agenda and notes from at least one meeting with board chair prior to school opening	Rooted School-Clark County Board of Directors	July 2022
Board Communication	Board meeting notes from authorizer pre-opening team's attendance of at least one meeting prior to school opening	Rooted School-Clark County Board of Directors	July 2022
Charter Application	All sections of submitted full charter application updated and revised, if applicable	Rooted School-Clark County Board of Directors	July 2022

If RS-CC'S charter is approved, we will have the following teammates in a full-time or part-time capacity:

RS-CC will have a core leadership team that will play a substantial role in the school's development, governance and management throughout its first charter term. These individuals are highlighted below:

Network and School Leadership Team:

Name	Area(s) of Expertise	Current/Intended Role
School Leader (TBD)	 School Leadership and Management Instruction and Assessment School Culture Family and Community Engagement 	 All aspects of school leadership in the Rooted Model with particular emphasis on academic achievement
Director of School Operations (TBD)	 Financial and Operational Management 	 All aspects of school operations including, not limited to: Transportation Food Service Facilities Budget & Finance Procurement

jonathan Johnson	 K-12 Education Workforce Development Non-Profit and School Leadership 	 Current Rooted School—Washington Board Member Founder and CEO of Rooted School Foundation Manager of start-up activities prior to hiring School Leader
Frank Ingargiola	 6-12 Education School and District Leadership Post-Secondary Education 	 Senior Advisor, Rooted School Foundation Primary coach of the Rooted School— Nevada School Leader
Kaitlin <u>Karpinski</u>	 K-12 Education School Leadership 	 School Leader, Rooted School—New Orleans Advisor to Rooted School—Nevada School Leader

RS-Clark County, like Rooted School-New Orleans and Rooted School-Indianapolis, aims to build a school and district partnership that commits to the following:

- · Providing accelerated and personal pathways to financial freedom for students
- Creating backward-designed instructional scope and sequences with local technology employers (and other in-demand industries)
- · Utilizing restorative disciplinary approaches and attachment-based teaching practices
- Fostering flexible learning environments that integrate digital technology tools to enhance teaching and learning
- Sharing best practices, professional development resources, and opportunities with other school partners

Ways in which Rooted School-New Orleans and Rooted School-Indianapolis have collaborated with districts in their respective regions include:

- Hosting site visits for district guests
- Facilitating professional development sessions on distance learning and CTE approaches
- · Sharing best practices on student attainment of industry-based credentials
- Creating a historic partnership with Eastern Star Church and in coordination with the local district, fulfilling the educational pillar of its four-pillar community revitalization plan, the ROCK Initiative in Indianapolis
- Providing an exemplar local model for career-connected learning

Director of Student Services SPED, ELL & CTE (TBD) • IBCs • Employer Relationships • Perkins Grant • Sp. Ed. Compliance Title VI • ELL Compliance	 All aspects of technology credentialing and technology partner development /recruitment Tech curriculum development & design Understanding / administration of of WIDA Writing of IEPs
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Attachment 15 Operational Execution Plan

rooted school

Operations Plan

Overview

Rooted School–Clark County's (RS-CC) board and Rooted School Foundation's (RSF) collective leadership teams share a national reputation and well over 100 years of a wide range of experiences and expertise that qualify them to launch and lead RS-CC to reach its mission and vision. This leadership team successfully launched Rooted School–New Orleans (RS-NO) and Rooted School–Indianapolis (RS-I) and each member will contribute their expertise in staffing, professional development, performance management, general operations, facilities management, and state/federal compliance. RSF's operational expertise for the Rooted model is captured in a school leadership blueprint called the Green Balloon Fellowship Modules. These modules, their respective deliverables, and how the school will complete the day-to-day operational responsibilities is captured below.

Green Balloon Fellowship Modules

Module 1: Deliberately Developmental Leadership – This module will provide RS-CC's team the training and tools to create a Deliberately Developmental Organization (DDO). This is the core framework that Rooted uses to establish and facilitate its adult culture. There are currently nine deliverables for this module.

- RS-CC's school leader completes all deliverables for Module 1 by August 1, 2021
- RS-CC's team completes anchor texts for required DDO reading by July 1, 2022
- RS-CC's team completes DDO reading debrief and text-based team development discussion during Base Camp by July 11, 2022
- RS-CC's team completes onboarding to DDO structures that will be used for the upcoming school year by August 8, 2022 during The Climb

Module 2: School Environment as a Garden – This module will provide RS-CC's team the training and tools to create a school environment that is grounded in restorative practices and trauma-informed approaches. This is the core framework that Rooted uses to establish and facilitate its adult culture. There are currently 12 deliverables for this module.

RS-CC's school leader completes all deliverables for Module 2 by December 31, 2021
 RS-CC's team completes anchor texts for required for restorative practices and trauma-informed approaches by July 11, 2022

] RS-CC's team completes onboarding to restorative practices and trauma-informed	
approaches that will be used for the upcoming school year by August 8, 2022 during The	
Climb	

Module 3: Instructional Model – This module will provide RS-CC's team the training and tools to execute the Rooted model that ensures students grow into self-directed learners, engage in project based learning, and earn Industry Based Credentials that make them competitive for entry-level jobs in high-growth, high-wage industries. There are currently 11 deliverables for this module.

- RS-CC's school leader completes all deliverables for Module 3 by June 30, 2022
- RS-CC's team completes anchor texts required to execute Rooted's instructional model by July 11, 2022
- RS-CC team completes onboarding to Rooted's self-directed learning model, approach to project based learning, and methods for teaching Industry Based Credentials by August 8, 2022 during The Climb
- RS-CC team completes student onboarding to Rooted's instructional model by August 10, 2022 during new student orientation

Module 4: Keeping Rooted School a Rooted School – This module will provide RS-CC's team with the binding expectations for performance to ensure RS-CC is aligned to the Rooted Way and, ultimately, Rooted School Foundation's long-range mission and vision. These binding expectations are established through a multi-year Service Agreement between RS-F and RS-CC. There is currently one deliverable for this module.

- RS-CC's school leader complete's all deliverables for Module 4 by December 31, 2021
- RS-CC's school leader and board recommend services that RSF renders in support of RS-CC during its founding year by December 31, 2021
- RS-CC's school leader, board, and RSF establish structures that will ensure the services outlined in the Service Agreement are executed with fidelity

Module 5: Closing 228 – This module will provide RS-CC's team with the north star for RSF and binding expectations for rapidly reducing and eventually closing the racial wealth gap in Clark County. There are currently four deliverables for this module.

- RS-CC's school leader completes all deliverables for Module 5 by December 31, 2021
- RS-CC's team completes onboarding to Rooted's approach for rapidly reducing and eventually closing the racial wealth gap in Clark County by July 11, 2022
- RS-CC team completes student onboarding to Rooted's mission and vision for rapidly reducing and eventually closing the racial wealth gap in Clark County by August 10, 2022 during new student orientation

and	dule 6: World Class Operations – This module will provide RS-CC's team with the training tools to build the governance and operational model–supporting Rooted's school model–to cute Rooted's mission and vision. There are currently two deliverables for this module.
	 RS-CC's school leader and board complete all deliverables for Module 6 by June 30, 2022 RS-CC's school leader and board complete the first board retreat by March 1, 2022 RS-CC's student and staff handbooks are completed by June 30, 2022 (these handbooks will be adopted from RSF's pre-existing handbooks from other schools it
	supports
L	

Attachment 16 Facility Proof of Commitment

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The Rooted School-Las Vegas, Nevada Facilities Development Planning Charter Schools Development Corporation

Charter Schools **Development Corporation** www.CSDC.org

April 20, 2022

April 20, 2022

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I. Introduction

Charter Schools Development Corporation ("CSDC") is pleased to provide this information to assist The Rooted School ("Rooted") with facilities planning including a turnkey development solution in Las Vegas, NV. CSDC's "lease-with fixed purchase option" model allows school leaders to focus on the educational mission while we focus on the business of financing, designing and constructing a facility built-to-suit to meet the unique needs of the school model, student population, and budget. Leasing from CSDC as an interim step to ownership enables our tenant schools to establish a record of sound business practices and good academic results, setting the stage for long term stability and success. CSDC will oversee the entire process on your behalf – from contractor selection and initial site design through permitting and construction to final punch list and school opening. CSDC offers flexible terms to meet each individual school's strategic vision:

- Short- or long-term lease with options to extend;
- Fixed and below-market rent escalations;
- Fixed-price purchase option set at commencement of the lease and exercisable at any time; and
- A development process that is completely transparent using an "open book" approach to account for all project costs.

Our team is well-suited to partner with Rooted to provide the spectrum of facilities development services for this project:

- Experience Through our national K12 experience, CSDC has developed over to 3.9 million square feet of educational facilities for lease with option-to-purchase to 89 charter school organizations. Across all programs 248 schools have been served to date.
- Knowledge Our team is comprised of talented professionals specializing in the nuances of successful K12 project planning and implementation as well as direct experience working in the Nevada, and specifically the Las Vegas charter school market.
- Relationships CSDC has worked with over 61 lending institutions across the country, a dozen • CMO/EMO networks, eight philanthropic partners, multiple public finance authorities/issuers and state, local and federal advocacy organizations. Specifically, in the Las Vegas market, CSDC has built relationships with Opportunity 180, Charter School Growth Fund, the Las Vegas Community Investment Corporation (a wholly owned subsidiary of the City of Las Vegas, charged with community development advocacy and projects), local realtors, architects, engineers and construction contractors. Several national Community Development Finance Institutions ("CDFIs") have partnered with us on our work in Las Vegas and their funds may also be leveraged to benefit Rooted. Combined with CSDC's seven individual federal credit enhancement grants from the Department of Education totaling over \$58.6 million – the largest by number and dollar amount – and three CDFI (Department of Treasury) awards totaling \$3 million, our organization and impact is strong. The continued faith of the U.S. Department of Education and Treasury and our philanthropic donors is a testament to CSDC's effectiveness in helping charter schools create safe and sound facilities for educational opportunity and excellence, and our impact on community rejuvenation.

II. Our Project Team, Qualifications & Past Performance

A. Organizational Entity

Mission and History:

The Charter Schools Development Corporation ("CSDC"), a 501(c)(3) tax-exempt, District of Columbia nonprofit corporation and Community Development Financial Institution ("CDFI"), was established in 1997, and has helped public charter schools acquire and finance facilities at the lowest possible cost. CSDC's mission is to support quality school choice for underserved students by developing and financing affordable charter school facilities, as a credit enhancement provider, a nonprofit developer of facilities, and as a lender to charter school organizations.

Our original support program, the "Building Block Fund" was established to provide credit enhancement to lenders and landlord who support early stage charter schools. Through this program, CSDC noticed a proliferation of schools entering into less than attractive lease agreements, for example, leases with no purchase options or purchase options at rates that resulted in economic burdens on school budgets once exercised, and leases from private landlords that passed on real estate taxes to schools in the form of higher lease rates. As a result, CSDC identified the need for a nonprofit organization to finance, develop, own and lease facilities to schools with much more attractive terms as an alternative solution in the market. Additionally, CSDC launched its direct lending activities in 2008, a program capitalized with three federal grants and philanthropic funding from the Ewing Marion Kauffman Foundation of Kansas City and the Daniels Fund of Denver. We have successfully met the financing needs of a wide range of charter schools, from start-up and newly formed schools with less than three years of operating history seeking to secure leases, leasehold improvement loans and mortgage financing, to those that are growing and expanding into permanent facilities.

CSDC created its non-profit turn-key facilities development program, the Turnkey Development Program ("TDP"), to help charter schools focus on their true mission – providing the best education possible for every student. At CSDC, we know that accomplishing that mission requires a safe, comfortable, and inspiring learning environment that meets the needs of students, teachers, and administrators – right now, and as schools experience growth. Under CSDC's TDP "lease-with fixed purchase option" model, we remove the burden of financing, designing and constructing facilities built to suit the unique needs of each school model and student population, allowing school leaders to focus on the business of operating a high quality school. The CSDC team understands the complexities of real estate development and finance and will deliver a customized "turnkey" solution to each charter school client in alignment with their overall facility vision. Additionally, CSDC has a Fee Developer Program that offers the same services as CSDC Turnkey Development Program but CSDC is not the Owner or Landlord and the project is not financed on CSDC's balance sheet.

CSDC's Programs and Services:

CSDC's innovative financing and building programs put new and expanding charter schools into efficient and economical facilities, on time and on budget. CSDC covers the facilities gap so educators can focus on closing the achievement gap. As previously mentioned, CSDC offers a variety of a la carte programs, any combination of which can be utilized to deliver the Rooted project at the lowest

possible cost.

Turnkey Development Program – CSDC's Turnkey Development Program ("TDP") finances, designs, constructs and leases cutting edge, custom facilities built-to-suit the unique needs of each school's educational model, student population and budget. Our "lease-to-own" model gives schools access to inviting, modern facilities that they can grow into and take over once they're established.

Consulting and Fee Developer Services – Partner with CSDC and outsource property development, financing and/or project management. The school is the borrower and owner while we oversee the entire real estate development process on your behalf – from initial site design and financial modeling through permitting and construction to final punch list and opening day of school.

Lease & Loan Guarantees – The Building Block Fund helps charter schools obtain leases and loans by acting as a "co-signer" for the school's payment obligations. As the largest guaranty program of its kind, the Building Block Fund provides the financial backing charter schools need to secure educational facilities at an affordable cost.

CSDC Direct – CSDC Direct offers a variety of loan products that provide charter schools, especially new schools with little or no operating or credit history, and those serving low-income communities with affordable financing options for the acquisition, construction, renovation and expansion of educational facilities. CSDC can provide both senior and subordinate loans to projects it manages or develops under its TDP model.

CSDC's Track Record:

From lender to guarantor to real estate developer, CSDC has an exclusive charter school mission, and is possibly the only CDFI and nonprofit developer that works exclusively with charter schools nationwide. Our past performance is summarized below:

Nevada and Las Vegas Experience:

CSDC has supported the creation of over 2,200 new seats through property development, guarantees and direct loans, totaling over 121,000 sq. ft. of educational space, in Nevada. We have worked and provided services to 6 operating charter schools. We have provided (and continue to provide) support to 2 charter schools who are authorized, but have not yet opened. We have been actually under construction/development on various project for the past 7 years, so we are familiar with the local and state requirements for design, construction, traffic mitigation, special use permit and other key factors that specifically relate to charter school facilities in the Las Vegas market. National Experience:

• CSDC has provided over \$165 million in federal and philanthropic credit enhancements for 248 charter school organizations in 30 states and the District of Columbia serving over 92,000 students (62% low income), leveraging \$763 million in private capital financing and lease commitments for 7.5 million square feet of safe, modern and affordable educational facilities.

• CSDC has developed over 3.9 million square feet of educational facilities for 89 charter school organizations, serving almost 43,000 students through its Turnkey Development Program. CSDC has financed over \$355 million in real estate projects, the end goal of this program is a sale to our charter school tenants under this program when they are operationally and financially capable to access

capital.

• CSDC has originated \$36 million in facilities and tenant improvement loans through its direct lending programs. CSDC's lending initiatives have leveraged \$117 million in debt financing and lease commitments to 56 charter school organizations.

- CSDC's subsidiary, CSDC New Markets Fund, LLC, received \$40 million in New Markets Tax Credits and fully sourced (sub-allocated) those federal income tax credits for a like-amount of equity and debt capital used to finance permanent facilities for five charter schools in four states and D.C
- CSDC successfully acquired and acted as the QALICB for three New Markets Tax Credit financings, providing low cost leases to charter schools who will ultimately benefit from the NMTC program. One of these projects is located in Las Vegas.

B. Team Qualifications

Project Team:

CSDC proposes the following Project Team for this engagement with Rooted. Detailed bios of the key team members are included below.

Project Management (*Financing, Acquisition, Pre-Construction, Design, Construction, Occupancy, Lease Administration*):

Laura Fiemann, Chief Development Officer Tim Behrens, Project Manager

Laura Fiemann, Chief Development Officer – Laura joined CSDC in 2010 as its Senior Vice President. She is largely responsible for marketing and administering CSDC's Building Block Fund (lease and loan guarantees), Mountain West Charter Schools Fund (direct loans) and other CDFI & direct lending initiatives nationally. Laura also administers CSDC's Turnkey Development Program for those projects in the western U.S. She is also responsible for facilitating communication between CSDC's charter school clients, commercial banks, potential landlords and its credit committee.

She has been in the public finance business for 30 years, working with municipalities and non-profits on their project finance needs. As a bond underwriter at a registered broker dealer firm for 9 years and then Vice President at a private capital company, she fine-tuned her skills to serve the unique needs of charter schools regarding facilities financings.

Laura is responsible for raising capital to support the growth and expansion of CSDC's CDFI Operations and direct lending program, and oversees real estate development projects in the western U.S. She provides ongoing technical assistance to client schools during the early/start-up years to prepare them to eventually finance a permanent home through bank or tax exempt bond transactions. Laura has dual degrees in Finance and Management from the University of Colorado and is active in her community and serves on the Partners For the Common Good New Markets Tax Credit Advisory Board.

Similar Project Experience:

It is our belief that by increasing school choice, student outcomes will improve. Students are not limited by their circumstances; charter schools and the education opportunity afforded are the very vehicle to propel kids for long term success. This belief is seen and felt in each of our projects, with examples described below. The track record discussed above is only made possible because of the project team and entire staff who live and breathe our mission. CSDC staff have specific experience nationwide. Below are examples of similar projects undertaken and completed by CSDC recently that have similar characteristics to Rooted's described project.

Similar Projects: Turn-Key Development-Adaptive Re-use

Futuro Academy

Location: Las Vegas, NV



Type of Project: Acquisition and renovation of a 50,000 sq. ft. former grocery store located on 4.6 acres of land. In 2017, CSDC completed a New Markets Tax Credit financing for the acquisition and Phase I renovation. Since that time, CSDC has completed three additional phases of expansion and improvement to the property, providing nine additional classrooms, a health center, additional restrooms, SUP required offsite road improvements and other building enhancements. CSDC is currently in the final construction phase of the project and is expected to be completed by July, 2022 in support of Futuro's ultimate enrollment of 584 students.

Role: Owner and Project Manager Total Project Cost: Projected final total \$10,000,000 Delivery: Ongoing, final July 2022 Contact: Ignacio Prado, Executive Director, (702) 509-1612, Director@futuroacademy.org Value Added Results: Renovations planned and executed in 5 phases over 5 years to accommodate a slow growth school model, ensuring school affordability. Location: Colorado Springs, Colorado



Type of Project: Acquisition and renovation of an approximately 93,500 sq. ft. former Macy's Department store. In 2019 CSDC completed the construction of about half of the available space for this de-novo charter school in Colorado Springs. The project was delivered on time and on budget and will ultimately serve 700 students with additional build out phase planned for the next 3 years.

Role: Owner and Project Manager Total Project Cost: To date \$7,825,000 Delivery: August 1, 2019 Contact: Mike Miles, fmikemiles@gmail.com Value Added Results: CSDC came into this Project when another financing source fell through 30 days prior to the required start of construction.

Ethos Academy

Location: Atlanta, Georgia



Type of Project: Acquisition and renovation of an approximately 11,600 square foot former church facility. Additional Phases will add a new classroom building and gymnasium.

Role: Owner and Project Manager

Total Project Cost: Phase 1 \$2,300,000, Phase 2 (currently under construction) \$1,700,000, Phase 3 (Anticipated in 2023) \$2,310,000

Contact: Emily Castillo Leon - emily.castilloleon@ethosclassical.org or (865) 384-4179

Foundation Academy Charter School:

Location: Trenton, NJ Type of Project: Renovation to existing 30,000 sq. ft. three-story building with 16 classrooms and cafeteria and ground up construction of a 10,500 sq. ft. three-story addition with 8 classrooms and information commons. Role: Owner's Representative and Project Manager (Fee Developer Program) Total Renovation Cost: \$8,550,000 Total Project Cost: \$14,200,000 Delivered: August 2019

Value Added Results: CSDC successfully secured entitlements, project financing and assembled a project team that is implementing a phased-construction plan to accommodate the school's occupancy needs during construction.

Additional Project samples and references provide upon request.

C. Financial Capacities

CSDC is a financially sound non-profit that controls expenses and generates revenue in order to be entrepreneurial and self-sustaining and serve more charter schools. As of 12/31/21, CSDC reported over \$250 million in Total Assets and over \$65 million in Net Assets.

All of our audits, which are prepared on a consolidated basis for CSDC and its subsidiaries and affiliates, to date have been unqualified and confirm full compliance with reporting requirements, cite no internal control deficiencies, and no instances of non-compliance with Government Auditing Standards. Because CSDC receives federal grant funding, the auditor's reports also opine on the company's Internal Controls over Financial Reporting and Other Compliance matters and cite full compliance.

Recently, CSDC successfully completed the U.S. Treasury Department's rigorous process for CDFI recertification indicating a determination of CSDC's financial stability, community development mission focus, and managerial competencies. CSDC exceeded all of CDFI's performance standards.

III. Our Project Management Approach

Location Determination: Working in concert with Rooted's visionaries, staff and other stakeholders, CSDC will assist with the property selection process. Using our experience as a guide, we will make thoughtful recommendations about a particular site- financial, operational and practical (like if a site is not going to be approved by the City, or other considerations). A wise man (Laura Fiemann's father) said "Never fall in love with a house, it will never love you

back"....while there may be sites you "love" we believe that fully vetting the good, bad and ugly on site selection is critical.

Design and Development: Through the design review and entitlement process CSDC will ensure Rooted's programming needs are met. CSDC provides well-coordinated communication and consistent application of agreed-upon principles to establish consensus among diverse project stakeholders – resulting in a project in which school operators and the surrounding community can all take pride. To the extent possible, CSDC will work with the architect team to develop energy efficient building features promoting sustainability and responsible real estate development.

COST ESTIMATING AND BUDGET DEVELOPMENT:

Budgets: Setting the parameters for a project's budget is a critical, early step in a construction project. Once created, it needs to be continually reviewed, adapted, and reconciled as conditions change. On the hard cost side, it can be:

- A basic application of benchmarks like Square Foot (SF)/student and cost/SF of similar projects in the area;
- A detailed list of spaces for net assignable square feet, with an efficiency factor for gross square feet, with a cost/SF applied by space allowing for the difference between wet areas and large open spaces like gymnasia; and
- A breakdown by CSI division with a cost/SF per division or subdivision.

Allowances are often applied for sitework, parking, landscaping, playgrounds, and fields. An inflation factor is applied when the construction is projected out multiple years.

On the soft cost side, it can be:

- A basic application of a hard to soft cost ratio from similar projects;
- A list of categories such as A&E, studies/surveys/testing, utilities, approval fees, FF&E, PM, financing costs, contingency, with some allowances and % factors applied; and
- A detailed list of anticipated contracts and commitments, and a detailed list of FF&E.

The full budget is the basis of CSDC's Excel budget tracking model. The model has the simplicity and control of single data entry while providing flexibility in reporting and allocation of contracts to budgets. It is a nimble and effective tool that grows and adapts as the project evolves. Its primary purpose is to identify the overall budget, the amount the owner (either CSDC or the school) has committed to date, and the amount the owner has incurred/paid to date. It is the basis for packaging monthly draws for invoice payments.

On the soft cost side, it can be:

- Report of funds paid per month;
- Report of expected commitments and related status of contingency;
- Look ahead report of commitments and payments in months ahead and impact to contingency;
- Report of change orders approved and under review;

- Report per contract of invoices and % complete; and
- Report of budget, commitments, and expenses by phase.

Estimates: The Architect & Engineering ("A&E") team is tasked to provide a design that can be afforded within a stated construction budget. It is important to have interim checks to confirm if this is tracking well, when there is still time and opportunity to align price and budget strategically. CSDC's preferred method for interim cost reviews focuses on the design review periods of the end of schematic design and the end of design development. Indeed, the determination of "end" of these phases should be based predominantly on the status of the drawings being ready for a quality cost estimate. The estimate would be part of an overall pre-construction services package from a local builder. This should reflect current market conditions for availability of labor and specific skills as well as reflect any high or low quantities of materials that can influence discounts or surcharges. It is likely a combination of specific quotes from the estimator's preferred vendors and application of information from recent bids on other jobs. As estimators share their assumptions and interpretations, the A&E team can confirm their intentions, improve the documentation, and even enhance their ideas with the new input. The result will be a low/high range cost estimate. Depending on how this compares to the budget, this will influence how aggressively cost reductions may need to be found versus improving the specificity in the documents.

Change Order Processing: CSDC is proactive in identifying any and all issues that could lead to a cost impact, positive or negative, and not waiting for a document to be initiated by the contractor or other vendor. Engaging a cost impact component in all discussions creates a consistent sensitivity and promotes an informed environment to mitigate surprises. It allows for stronger contingency planning and strategy implementation. Critical moments for checking on contractor cost of work or extension of time in particular include the following:

- All bid packages, when the spread between vendors for the same scope has noticeable variations.
- RFIs, when they are issued;
- All submittals referencing a substitution, and any that are delayed in appearing or in being approved or updated; and
- When trades are re-sequenced in the look-ahead schedule. All potential change orders (PCOs) are filed electronically and tracked in the budget tracking and contingency file as either approved, under review, or awaiting estimate. They are also tracked by driver. These can include: Owner decisions, utility company issues, approvals, coordination, and unforeseen field conditions. This enables a comprehensive tracking of how and why contingency funds are being applied.

Scheduling: Time is the most important commodity in effective team management. School only starts once a year, so everything CSDC does is with this in mind. Project schedules will designate activities necessary to complete the scope across specific dates and milestones, which will track towards the submission of final deliverables. The project team will meet regularly to monitor the project schedule and we will use task-oriented "Action Item" formats to best serve the team and the phase of the project. While simple, this tool can be very effective at confirming individual responsibilities and expectations of deadlines, performance, and current critical path items. All scheduling will be coordinated to ensure that every team member can track the progress of various project activities at any point during the process. CSDC will be responsible for managing the overall project schedule and

Action Item tasking. CSDC applies a variety of tactics for maintaining schedule, including the following:

- Conducting consistent standing meetings;
- Reviewing the submittal register at the start of construction and determining a schedule for submittals with both the Architect and Builder, as well as determining expectations for reviews of shop drawings; and
- Identifying long lead items and implementing early start agreements for them as necessary

Creating and analyzing phasing options typically includes acceleration options as ways to avoid extended financing costs, to reduce the risk of missing a critical deadline for operations or financing, and to get to occupancy as soon as possible. Accelerating can have positive long-term impacts but can cause short-term costs in creating swing spaces and in working without some programming areas, perhaps even limiting operating capacity. These all need to be considered and weighed in on during the initial and interim decisions related to schedule. CSDC recognizes that schedules are needed for different purposes.

We propose for most adaptive re-use projects that a phased construction approach is used. We would suggest an approximately 25,000 sq foot facility that has 2 phases of construction as Rooted grows it's enrollment, followed by the possible construction of an additional permanent structure on the site as classroom and programming prescribes.

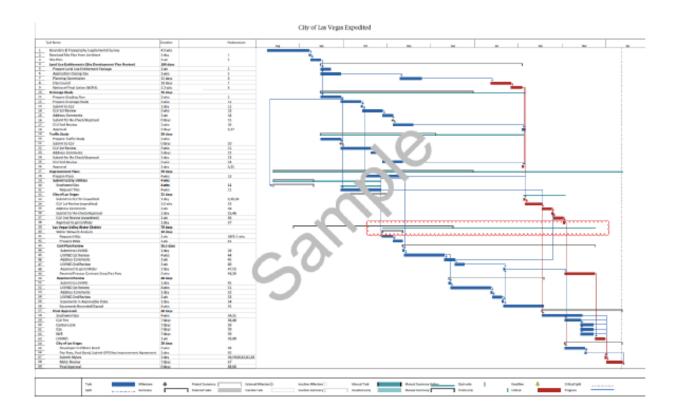
The City of Las Vegas can be extremely challenging when it comes to entitlement, design, Special Use Permit, traffic planning, permitting and construction. Not only have prices soared in the past 3 years, the entitlement process has become extremely drawn out as well.

Below is a scheduling chart that reflects the following assumptions and timeline to start construction:

- 1) Property identified in Summer, 2022 and put under contract
- 2) No significant environmental, drainage or traffic planning required
- 3) Entitlement and design begins on or before August 1, 2022
- 4) Actual construction may vary but 4 months is average for adaptive reuse (delivery August, 2023)

Additional tools to be implemented:

- Planning tool to set the framework for agreements with the Architect and the Builder;
- Planning tool to set milestones for financing; Update tool to share basic information about the status of the project at a big picture level for members of the Board, neighbors, parents, and staff;
- Implementation tool to align efforts in design, financing, approvals, hiring, etc.;
- Implementation tool to anticipate cash flow and commitment demands; and
- Implementation tool to assess the day-to-day progress against critical path to identify the level of risk management needed to ensure the target date for certificate of occupancy. CSDC adheres to best practices for project management to create different versions of the project schedule.



Additional tools to be implemented:

- Planning tool to set the framework for agreements with the Architect and the Builder;
- Planning tool to set milestones for financing; Update tool to share basic information about the status of the project at a big picture level for members of the Board, neighbors, parents, and staff;
- Implementation tool to align efforts in design, financing, approvals, hiring, etc.;
- Implementation tool to anticipate cash flow and commitment demands; and
- Implementation tool to assess the day-to-day progress against critical path to identify the level of risk management needed to ensure the target date for certificate of occupancy. CSDC adheres to best practices for project management to create different versions of the project schedule.

ADMINISTRATIVE REPORTING AND FINANCIAL MANAGEMENT:

Budget/Draw Tracking and Submittal: A snapshot of our budget tracking model is found below.

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-	RESERVENT ACCOUNT								-	_	-	-			220.054		12,193,093		_				100.440		11.201.558		(206,445)		_

Project Reports and Document Control: The entire project team is responsible for ensuring that the work is of the highest standard and quality throughout design and construction. Along with the architect and contractor, CSDC will complete frequent progress meetings during the design phase and during the construction phase to confirm the expectations of all parties. CSDC will be responsible for the collection and organization of all documentation and to effectively, concisely, and strategically disperse relevant documentation to other stakeholders when necessary or requested.

Progress Reports: The project team acknowledges that many stakeholders need to be briefed at different stages of the project with varying levels of detail. The team will also anticipate what the school's next probable set of decisions will need to be and will gather and present the related resources and context. A set of consistent updates will be developed which will also serve as a useful archive brief of the project milestones upon completion. Each progress update report addresses relevant process efforts, documents decision-making and results, and includes a "look-ahead" schedule.

Construction:



Construction Supervision: CSDC will supervise the construction work in such a manner as intended to keep costs of the construction work as close to the budget as possible. To that end, CSDC will be onsite to inspect the GC's and subcontractors' work as well as coordinate oversight from the design team. CSDC will coordinate and monitor inspections by third parties, including, but not limited to, funding sources, public authorities, and other authorized persons. Our progressive teamwork approach establishes a positive relationship with the contractor and design staff. CSDC often looks to "out-of-the-box" solutions to common obstacles in the construction field. These solutions utilize the expertise of all relevant parties to provide a clear and decisive direction that best benefits the client and the end user. In all of its work, CSDC endeavors to obtain satisfactory performance from the GC, Architect, Engineers, and all other members or other vendors involved in the project. We will recommend courses of action to Rooted if requirements of the Construction Contract, or any other project related contract are not being fulfilled.

Construction Closeout: The project closeout phase is a very important and challenging time in the development of a school facility. This is when the collective design and construction team's knowledge and experience needs to be transferred to Rooted's appropriate operations departments. This is also a time when lingering issues and unfinished items must be finalized so that a fully functional facility can be efficiently operated. Upon completion of various portions of the project, the contract responsibilities of certain subcontractors will be fulfilled, and the contract relationship between the GC and those subcontractors will be concluded. Upon overall completion and acceptance of the entire project, conclusion of all contract responsibilities and record documentation will be finalized through formal project closeout procedures. Since specific items will need to be concluded before certain individual subcontracts can be closed out, the GC will need to develop a Closeout Checklist for each

subcontractor. This checklist should be completed for each subcontractor to identify and monitor the various items required before final acceptance of the work, including:

- Submission of final documentation;
- Furnishing surplus stock and spare parts;
- · Completion of all contract requirements, including all punch list items;
- · Submission of certifications and warranties; and
- Submission of all waivers and final lien releases before release of retainage or final payment can be approved.
- •

IV. Scope of Work, Standard Terms and Pricing

Turnkey Developer Services (CSDC is the Owner):

CSDC's is one of the only nonprofit developers with a mission that includes partnering with newly authorized schools – using our balance sheet to obtain the financing necessary to acquire property and develop it on a build-to-suit basis to the client school's programmatic needs. The information provided below is reflective of our standard processes. The COVID-19 pandemic has posed many challenges to all phases of pre-development, development, and construction, but the CSDC team remains committed to maintaining, in a safe and responsible manner, all expectations and timelines.

As a 501(c)(3), CSDC is exempt from various construction requirements and taxes that result in overall cost savings to the school, i.e. CSDC is exempt from competitive bidding and/or Davis-Bacon laws that apply to charter schools directly. In addition, CSDC is exempt from property taxes in most states, and files for property tax exemption upon acquisition of the property. In Nevada, our client schools enjoy a property tax exemption through the CSDC Lease.

	CSDC finances the total cost to complete the building improvements based on CSDC's balance sheet.										
Crea	Credit analysis required for CSDC Board approval 6 - 12 Weeks										
1.	 Project proforma indicating no more than 20% of Rooted's per pupil revenue spent on facility. 										
2.	Initial Due Diligence – Rooted-required documents to be reviewed by CSDC for underwriting purposes.										
	Rooted Las Vegas Checklist										
	Charter application Charter approval										

<u> </u>			
'	 Contact at authorizer – name, email, phone 		
	 Budget and five-year financial 		
7	projections		
	 Financial contingency plan 		
	 Five-year enrollment projections 		
	broken down per grade		
	 Marketing plan and schedule for 		
	plan roll-out		
	Board bios and skills matrix		
•	 Succession plan for both board 		
	and school leadership		
•	Letters of support from local		
	stakeholders and target market		
	community members		
	Initial Due Diligence – property-relate	d documents dated less t	han 6 months to a
3.	year.		
•	 Appraisal 		
•	 Phase I and Reliance Letter address 	ed to senior lender	
•	 Phase II (if necessary) 		
•	 Environmental reports: lead, asbest 		iceably visible or
	historically the building has been a	subject of flooding)	
	ALTA Survey		
	Geotechnical report (if applicable)		
	Traffic Survey (if applicable)		
	Title report		
4.	 Zoning capability indicating school u 		al decign and
4.	Identify the design-build project team	and develop a conceptua	ai design and
5.	preliminary design budget. Term Sheet(s) from anticipated lende	r(c) in an amount orginal to	the total project
J.	cost.	r(s) in an amount equal to	the total project
	cost.		
Real	uirements for closing on the acquisition	and construction	4 - 6 Weeks
-	ncing		
1.	Commitment letters and loan docume	ents from senior and subo	ordinate lenders,
	and any additional funding partners.		-
2.	Fully executed Lease with Option-to-P	Purchase.	
3.	Final contract with general contractor		
4.	Final design and permit set drawings.		
5.	Final Guaranteed Maximum Price (GM	1P) budget.	
6.	Construction schedule meeting Roote		nts.
CSD	C manages the construction process.		
Entit	tlements, Construction through certifica	ate of occupancy	10-12 Months

1.	Pursue and confirm all necessary entitlements.										
2.	Act as "Project Manager" with any general contractor to help n	naintain									
	construction schedule and construction budget, and to manage	e project									
	performance through to completion.										
3.	Ensure project is proactively meeting city requirements.										
4.	4. Maintain/monitor project schedule, project budgets, permits, and inspections.										
5.											
6.	Participate in meetings as a member of the project team to monitor project										
	progress, schedule, budget, and address issues needing school input.										
7.	Manage the building occupancy process including the punch list, delivery of the										
	building, system training, and identifying and tracking warranty	y items.									
CSD	C leases the building to Rooted with a buyout option exercisab	le anytime during									
the l	lease term										
Leas	e with Option-to-Purchase maintaining CSDC's standard lease	10 Years +									
term	15.	Renewal Options									
1.	1. Quarterly and annual reporting requirements will be identified in lease.										
2.	Building subject to annual inspections by CSDC to confirm upkeep and										
	maintenance.										
	•										

CSDC Standard Lease Terms:

- 10-year initial lease term with two five-year renewal options.
- Base Rent is initially calculated at 1.22x CSDC's debt service, increasing by 1% per year starting in Lease Year Three. Our overall financing and capital stack will be shared with Rooted, again, an open book approach to insuring transparency. We can offer Rooted deferrals of rent in Years 1 and 2 as described in the lease proforma below.
- Lease is triple net "NNN" and the school will be responsible for all property-related expenses.
- CSDC charges a 2.50% Developer's Fee that is earned at acquisition and payable when the school takes occupancy.
- Property may be purchased at <u>any time at a FIXED price</u> by Rooted or a Rooted-assignee.
- Fixed Purchase Price is calculated based on 105% of the Total Project Cost and does not escalate during lease term. The school can control the overall development costs (within the context of code requirements) which ultimately drives the calculation of rent and purchase price
- Rooted benefits from any property appreciation.

CSDC Turnkey Pro-forma:

Paralaan Option Prior Ious Credits

Our assumptions have been made on a sample property for sale, identified by CSDC in the Las Vegas market in March, 2022, which has since been purchased, but for comparison purposes we feel continues to be a good bellweather of a potential project for Rooted.

25,000 square feet of existing space, on 4 acres. Adaptive re-use of a church to a school.

Sample Lease Proforma including rent deferrals in year 1 and 2.

					The Roote mple Leas	e Proforma						
Analysis Start Date	34/1, 202											
Final Start Date (V+1)	July 1, 2023											
Building Size (8327)	25,000											
	LINE OF PELANCE	*0							LINE OF POS	ANCENE		
			2 - 22	S of Tank	-							
regardy Augustian		3,275,000 1	100	005			Sector	NO 8	de Tinnig	Sub-dela	Select	744
Soring Conto		25,000		176						(CECCOTA)	Cathletin	
in Work	-					Loss Assess	1 1	246225 1		1 138,05	1 .	1 4/41/30
provide Hard Code	*	1,300,000				LTC	-	150%	0.0%	21.05	0.0%	100
of Casts (head, have from, also due (digenant)	1200% 2	196000		25		internet Rate		4.00%	0.00%	1255		3.50
Scientific and the second second second		30000				AmeriTem (years)		25		25		
											-	
SEC Per	230% 2	100,000		2%		Mastley Payment	1	18,783 \$		3 5,649		
integracy and Project Cont	100%	12,000		245		Accased Paymont		12,444		1 65,90	s -	1 30,87
Ad Propert Cast		4,001,000	1 348	76%		Mastley payment (3/C)	*	12,494				
	INCOME IN OF PERSON	1949				6	SDC Terri	ier Similer	Ded Terms			
serves of Pleaseing				5 of 2 and		13 year loase with 6 few						
nie Dritt		3,748,275 2		1996		Num Rest is 1.22 lines			This per year size	ting in year 3		
de Passing				0%		7% is applied to the Poet	lase Option					
in bis (CEDOCEPTs)		1,369,625 3		25%								
aland Canterbulian Intel Reserves		4,997,700	1	100%		Soland or all links been		spin the last of	the balling			
Berlahliky Assilysik	-		Tree 1	Tee 2	Y1	Y	т-	-1				
			2003-2023	20324	32425	223.2	200					
			Disting	UMeda	12Made	12 Marile	1214					
reputed Statest Revilland			300	200	300	400		400				
nie Dels			207,67	20,47 1	20,417	\$ 20,47		207/67				
die Frankry						1 .						
de dels (CEDICICERTA)		1	60,980 1			3 60,390	1	65,390				
del Dela Service		1	30,007	302,807 1	scatter.	1 30,807	1	10,011				
wid Service Concept			1.22	1.22	1.25	1.2		1.38				
ind as a Percentage of Perject Call		2,395										
usual Pacity Payment (Reef)					1 376,509	3 30,064	1	42,560				
Informal Rest (added to Purchase Option)			1 150,000.00									
int Rent Burley			1 218/01/38	1 339,0433	1 33,58.5	\$ 389,863.79	1 0	07.866,3				
Paralase Option Price												
underse Option Price (Inter Tableat Contribution)		3.00% 1						(CT)(C3				
will be portion of Longevillent increases								(2,00)				
Laborate .			1 100,000, 1									

1,07,83 1 1,06,09

2 18,000 2 3,000 2 - 2 2 5,997,80 2 5,447,85 2 5,441,729 3 This second proforma shows a scenario with possibly more realistic costs, including the acquisition of the vacant parcel for traffic planning and future development. We have included recently comparable cost per square foot in the Las Vegas market to bring shell space to code for school use and contingency.

		Lease	with Fixe	i Purchas	Battle e Option Pr June 4	oforma-Add	land/com	parable Ca	se		
Analysis Start Date Final Start Date (Tr 1)	June 4, 2021 July 1, 2022										
Building Size (8327)	17,000										
	USES OF PENANCE	NO			[USES OF PE	ANCENO .		
			Pm 39	No. 7144				_			
Property Augustian	1	3,05,000		-			Beate Delt	Selectioning	SAMA (CROCOTA)	Salard Contribution	Test
Cloning Costs		11,000		196							
Sile Work	*	1,275,000	\$ 75			Loss Assess	\$ 3,06,90		\$ 1,272,188	1	5,088,790
Improvements - Hard Costs				-		LTC	1508			0.0%	100%
Sof Cints (legal, bass free, alle due dilgenor)		100,000		2%		Internal Rate		-			4.294
Capital Internal	2376 2	125,000	-	25		AmeriTerm (years) Masilik Parment	1 204		1 536		20,36
Configurery	1005	48,710		15		Arrent Parment	1 26,20		1 100700		30,00
Table Propert Cast	1	1,000,100		205		Manifely payment (LC)	\$ 12,723				
	ROUBLED OF PINAN	1000						adard Deal Terms		[
Supress of Personne				No. Date		15 year loan with 6 few				-	
Senio Delli Selle Pinening		3,004,548	-	196		Num Real is 1.22 lines. Developer the is paid via					
Solar Proving		1272100		255		Scient or allintes get p					
Salard Castrination				05		Asked or allines been					
Total Scores	1	6,088,790	2214	100%		Purchase option in 107%					
Allerholder Andreis			Tree 1	Tes 2	Yest 3	Yes: 1	141				
			202.23	223.04	334,25	225.25	205.27				
			12Meda	Distriction	12Media	12 Media	12 Mode				
Prepared Statest Revoluted			208	300		395	30				
Senior Dela			1 26,30	\$ 26,763	\$ 24,74	3 36,38	\$ 26,70				
John Praying							s -				
The dis (CECCEPTs)			\$ 100,790	\$ 100,750	\$ 100,750	\$ 180,750	\$ 100,790				
Tabil Deld Service		-	1 342,68	\$ 30,69	1 342,46	1 30,63	1 30,66				
Deb Denis Connect				1.00							

John Pearsing										
Bale-Bills (CEDC/CERTs)	1	100,790		100,750		100,750		100,750		100,790
Tubi Delli Serrieri	1	342,68	\$	30,69	1	342,465	1	342,483	\$	30,68
Dels Service Connege		1.22		1.22		1.36		1.29		1.38
Base Losse Payment () 22 (18C)	1	41,80		etpo		490,877	\$	40,208		496,587
Carwily Balgrini Losse Payment	1	28,000								
CIP Application of Parals	1	180,000								
Available for Lease payments		400,000								
Sam Louis Payment per Pupil Unit (Annual)		1,778		1,177		100		745	:	767
N of Sale Per Papi Paulog (second profiles growth)	7,200	204		1.00		186		10%		17%
Readered Robert Readered to address 19% of Rate PPP	17%	38	,			30	t i	40		0
Purchase Option Print										
Paralaser Option Print (Inte Taland Contribution)	3,00% 3	1,343,188		1,340,100		1,141,188		3,343,188		5,96,188
Could for paid developer free	1					(8,307)		04,460		(25,836)
Paralanan Option Print Into Carolin	-	1,343,189		1,340,100		1,104,000	1	1,328,223		5,807,887

Attachment 17 **Rooted School** Estimated Insurance Proposal

isu		"ISU	
ISU Insurance Services - JPG dependently Owned and Operated i.cense #824634		ISU Insurance Services - JPG Independently Owned and Operated License #824634	JFC INSURANCE
		CARRIER TO BE DI Best Rating A++ (Superior) Financial	
		COMMERCIAL PROPER	TY INSURANCE
		PREMISES COVERAGES - BLANKET LIMITS Blanket Number and Coverages	LIMITS OF INSURANCE
Rooted School		1. Building	TBD
Clark County		Business Income with Extra Expense Personal Property	TBD
Commercial Insurance Proposal		TOTAL PROPERTY ESTIMATED ANNUAL PREMUS	
Presented by:		EDUCATORS PROFESSIONAL (in	cluding D&O, EPLI, Crime)
ISU Insurance Services - JPG Jay McLeod		Aggregate: \$ Directors & Officers Liability: In Employment Practices Liability: In Crime \$ Deductible: \$	LIMIT 1,000,000 2,000,000 coluded coluded 1,000,000 5,000 efer to Policy
July 13, 2021		RATING BASIS \$16 PER STUDENT \$200 AREA	
		TOTAL EDUCATORS (D&O, EPLI & CRIME) ESTIMA	TED ANNUAL PREMIUM: \$3,500.00
		Year 4 \$10,000.00	
	£		
Offices Coast to Coast		Offices Coast to C Our Knowledge Is Your Bes	

-B4218	'IGU
ISU Insurance Services - JPG	ISU Insurance Services - JPG
Independently Owned and Operated License #824634	Independently Owned and Operated License #824634
GENERAL LIABILITY INSURANCE	EMPLOYEE BENEFITS LIABILITY INSURANCE
	COVERAGE
COVERAGE LIMIT Each Occurrence: \$1,000,000	Each Occurrence: \$1,000,000
General Aggregate: \$2,000,000	General Aggregate: \$2,000,000 Deductible Each Employee: \$1,000
Products/Completed Operations Aggregate: \$2,000,000 Personal & Advertising Injury: \$1,000,000	Exclusions & Endorsements: Refer to Policy
Damage to Premises Rented to You: \$1,000,000	
Medical Expense "Any One Person": \$ 10,000 Exclusions & Endorsements: Refer to Policy	TOTAL EMPLOYEE BENEFITS LIABILITY ESTIMATED ANNUAL PREMIUM: \$200.00
Exclusions & Endorsements: Refer to Policy	
25/11/21/2012 09/2002 09/10/2	ABUSE & MOLESTATION INSURANCE
RATING BASIS \$16 PER STUDENT \$200 AREA	COVERAGE LIMIT
	Each Occurrence: \$1,000,000 General Aggregate: \$2,000,000
TOTAL LIABILITY ESTIMATED ANNUAL PREMIUM: \$1,700.00	Exclusions & Endorsements: Refer to Policy
Year 4 \$5,960.00	
	TOTAL A & M ESTIMATED ANNUAL PREMIUM: \$1,500.00
PLEASE NOTE: THIS POLICY MAY BE SUBJECT TO INSPECTION AND/OR AUDIT. THIS MAY RESULT IN A CHANGE IN PREMIUM, FORM OR TERMS, THIS PROPOSAL CONTAINS A BRIEF OUTLINE OF COVERAGES TO BE	Year 4- \$6,000
INCLUDED IN ANY POLICY THAT MAY BE ISSUED IN THE FUTURE. THIS IS ONLY A SUMMARY AND THE TERMS	1 cat 4 50,000
AND CONDITIONS OF ANY POLICY ISSUED WILL TAKE PRECEDENCE OVER THE PROPOSAL. QUOTES VALID FOR 30 DAYS.	CYBER LIABILITY INSURANCE
FOR 30 DATS.	
	COVERAGE LIMIT Each Occurrence/Data Breach: \$1,000,000
	General Aggregate: \$1,000,000
	Exclusions & Endorsements: Refer to Policy
	TOTAL CYBER LIABILITY ESTIMATED ANNUAL PREMIUM: \$7,500.00
	TOTAL CIBER EABLETT ESTIMATED ANOAL PREMIUM. \$1,000,00
	STUDENT ACCIDENT INSURANCE
	COVERACE
	Accidental Medical Expense: \$25,000
	Accidental Death Limit: \$25,000
	Exclusions & Endorsements: Refer to Policy
	TOTAL ACCIDENT ESTIMATED ANNUAL PREMIUM: \$315.00
	Year 4- \$1,260.00
Offices Coast to Coast	Offices Coast to Coast
Our Knowledge Is Your Best Insurance ⁶⁴	Our Knowledge Is Your Best Insurance ⁴⁴
11411 SOUTHEEN HIGHLANDS FKWY, SUITE 320, LAS VEDAS, NEVADA 89141 702-897-4400 FAX 702-897-7332 WWW.JPGINSURANCE.COM	11411 SOUTHERN HIGHLANDS PKWY_SUTH 320, LAS VEGAS, NEVADA 89141 702-897-4400 FAX 702-897-7332 WWW.IPGINSURANCE.COM

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	-	

ISU Insurance Services - JPG Independently Owned and Operated License #824634



WORKERS' COMPENSATION INSURANCE

COVERAGE	LIMIT
Workers Compensation	Statutory limits
Bodily Injury by Accident - each accident	\$1,000,000
Bodily Injury by Disease - each employee	\$1,000,000
Bodily Injury by Disease - policy limit	\$1,000,000

Class Code:	Estimated Annual Payroll	Rate Per \$100 Payroll
8868 – School Professional Employees & Clerical	\$325,000	.50
TOTALS		1000
FACTORS		Factor
Experience Modification	-	1
Premium Discount		
Schedule Rating	-	nja
Expense Constant	-	200
Terrorism		
TOTAL PREMIUM		0

OWNER/OFFICER INFORMATION		
NAME	INCLUDED OR EXCLUDED	
TBD	INCLUDED	

WORKERS' COMPENSATION ESTIMATED ANNUAL: \$.1,800

YEAR 4- \$4,800

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ISU Insurance Services - JPG Independently Owned and Operated License #824634



COMMERCIAL AUTO INSURANCE

COVERAGE	LIMIT	NOTES
Hired Auto Liability:	\$1,000,000	Per Accident or Occurrence
Non Owned Auto Liability	\$1,000,000	Per Accident or Occurrence
Hired Comprehensive Deductible:	\$500	
Hired Collision Deductible:	\$500	
Hired Auto Physical Damage Limit:	\$50,000	5

TOTAL AUTO PREMIUM: \$1,000

COMMERCIAL UMBRELLA INSURANCE

COVERAGE		LIMIT	
Aggregate Limit of Liability:	General Aggregate Products Completed	\$5,000,000 \$5,000,000	
Coverage A - Bodily Injury And Property Damage	Any one occurrence	\$5,000,000	
Coverage B - Personal and Advertising Injury	Any one person or organization	\$5,000,000	

TOTAL UMBRELLA ESTIMATED ANNUAL PREMIUM: \$3,500.00

Year 4- \$7,000

5

Underlying Insurance- General Liability, Hired & Non-Owned Auto, Employers Liability

PLEASE NOTE: THIS POLICY MAY BE SUBJECT TO INSPECTION AND/OR AUDIT. THIS MAY RESULT IN A CHANCE IN PREMIUM, FORM OR TERMS, THIS PROPOSAL CONTAINS A BRIEF OUTLINE OF COVERAGES TO BE INCLUEDE IN ANY POLICY THAT MAY BE ISSUED IN THE FUTURE. THIS IS ONLY A SUMMARY AND THE TERMS AND CONDITIONS OF ANY POLICY ISSUED WILL TAKE PRECEDENCE OVER THE PROPOSAL. QUOTES VALID FOR 30 DAYS.

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'ISU	'ISU
ISU Insurance Services - JPG Independently Owned and Operated License #824634	ISU Insurance Services - JPG Independently Owned and Operated License #824634
HEALTH & DENTAL INSURANCE	AUTHORIZATION TO BIND INSURANCE COVERAGE- NOT BINDABLE
COVERAGE LIMIT HEALTH HMO, ggg, POS OPTIONS DENTAL INSURANCE PPO OPTIONS	PLEASE NOTE: If changes are needed please indicate below and a revised proposal will be prepared for your approval. If no changes are needed, please sign the proposal.
TOTAL HEALTH & DENTAL ESTIMATED ANNUAL PREMIUM: \$36,000.00	Changes to be made are as follows:
Year 4- \$96,000.00	IF NECESSARY, PLEASE CHANGE THE EFFECTIVE DATE TO THE FOLLOWING FUTURE DATE
	BINDING INSTRUCTIONS & CONDITIONS: Subject to Final Underwriting QUOTE IS FOR INFORMATIONAL PURPOSES ONLY
	TOTAL COMMERCIAL ESTIMATED YEAR 1 ANNUAL <u>PREMIUM</u> .; 557,015.00 YEAR 4 TOTAL \$140,320
	It is understood that this proposal provides only a summary of coverage limits. The policy will contain the actual terms and conditions that will prevail in the event of a loss. The undersigned insured acknowledges its duty to select and maintain insurance coverage and limits that it deems appropriate.
	1/We accept the insurance program as presented by ISU Insurance Services-JPG as outlined in this proposal.
	Print Name - Insured's Representative Signature - Insured
	Date
	NAMED INSURED: Rooted School
7	8
Offices Coast to Coast Our Knowledge Is Your Best Insurance ⁴⁴	Offices Coast to Coast Our Knowledge Is Your Best Insurance ⁴⁴
13431 SOUTHERN HEGHLANDS PKWY_SUITE 320, LAS VEDAS, NEVADA 89141 702-897-4400 FAX 702-897-7332 WWW.JPGINSURANCE.COM	11411 SOUTHERN HEGHLANDS FKWY, SUITE 320, LAS VEDAS, NEVADA 89141 702-897-4400 FAX 762-897-7332 WWW.IPGINSURANCE.COM

EL			
ISILIN	surance Services - JPG		
	by Owned and Operated		
License #82	4634		
	NOTIFICATION INSTRUCTIONS:		
	at be informed of any changes in your operations, which would affect your insurance coverage. The types of changes that e notified about include, but are not limited to the following:		
I.	Newly acquired buildings/locations, business property, vehicles, and equipment. We will need some basic underwriting information to add buildings such as Buildings Replacement Cost Value, Year Built, Square Footage, Construction Type Number <u>of Stories</u> , alarm and sprinkler information. For autos, please include: Year, Make, Model, Serial Number, Garaging location and Cost New.		
2.	Any requests to add additional insureds/loss payees. Mortgagees etc.		
3.	3. Changes in the nature of your business/business operations, products manufactured or products sold.		
4.	All vehicles should be properly registered and the vehicle registration must be the same as the named insured on your policy.		
5.	Consolidation, Merger, and/or acquisition of any new companies.		
6.	Any property of others in your care, custody or control shick includes rental equipment unless they are insured elsewhere		
7.	Any situation where additional liability insurance may be required or increased limits.		
	that any changes to your coverage limits be made in writing and changes will only be made during normal business hours eived. If received after normal business hours, changes will be made effective the following business day.		
few. In toda	fer all lines of insurance including but not limited to: Health, Life, Dental, Professional Liability, and Bonds to name ay's litigious society there is always a need for Professional Liability. Please contact us if you would like us to obtain your additional insurance needs		
	Offices Coast to Coast		
	Our Knowledge Is Your Best Insurance ⁶⁴		

Attachment 18 Budget Narrative

Budget Narrative

The financial model was compiled using the three priorities of high-quality programming, financial sustainability and fiscal conservatism. We sought to craft a budget that would support the development of an outstanding educational program within reasonable financial constraints.

<u>Revenue</u>

PCFP Revenue: Revenues from Local Sources accounts for 75% of total funding for the school during Years 1-5. We assumed general education and special education funding levels would increase by 1%/year from current levels. See *Budget Flexibility Discussion* below for conversation about the School's thinking about strategies for handling scenarios in which funding deviates fromplan.

For enrollment, our model has the school opening in year 1 with a 9th grade cohort and a 10th grade cohort and then building up a grade per year. This approach allows us to achieve our full 9-12 grade span by year 3 of operations. The table below summarizes modeled enrollment.

Special education enrollment is assumed to be 13% of total enrollment. As a comparable, we lookedat Clark County's special education percentage, which is 13%.

Revenues from Federal Sources

Federal revenue accounts for approximately 20% of total revenue. The largest sources of Federalrevenue are Child Nutrition Program, Title I, IDEA Part B and CSP (Y0-Y3). Title I revenue is modeled at \$400/free lunch student. IDEA Part B is modeled at \$1,005/sped student. Child Nutrition Program revenue is estimated at \$5.49/free lunch student per day based on federal reimbursement rates.

Donations & Grants

We have assumed \$50,000 in Donations in Year 0 and Year 1 that will come from the Rooted School Foundation's Incubation Grant from Opportunity 180. We have assumed a modest school level fundraising goal \$100 per student that will be raised by the local school board. Additionally, RootedSchool Foundation has a successful track record of fundraising for other Rooted School campuses. Note that in all Years beyond Year 0, projected ending balance for the Year exceeds budgeted fundraising, so we are not dependent on fundraising success in those years

Expenses

<u>Personnel</u>

Salaries and benefits costs account for 48% of total expenses on average for the school during Years 1-5. Full detail for planned personnel is included in the 'Staff ' tab of the budget template. See body of the application for and budget attachment for detail on position count by Year. PERS Retirement plan cost is estimated at 15.25% of employee compensation. Medical insurance is estimated at \$4,326 per FTE.

Occupancy Expense

The approach our accountants take to estimate facilities cost when the exact facility is not known isto make sure aggregate facilities expense is in line with industry norms. Rooted School engaged with Charter Schools Development Corporation (CSDC) to support facility search efforts to determine a feasible projection for rent costs and other occupancy related costs. In the event that CSDC is unable to locate a feasible facility option, Rooted will seek a shared space option with Nevada Prep as an alternative. Total facilities costs are modeled at between 14 and 17% of total expense during Years 1 through 5, which we believe to bea reasonable range. We have assumed an average of 85 sq. ft. per student.

Other Expenses

Other Expenses comprise about 30% of the overall expenses modeled for the school. In developingits cost estimates for those it relied on its experience managing Rooted School New Orleans, RootedSchool Indianapolis, Rooted School Vancouver and comparables from the Las Vegas market. The largest individual line items in this section are CMO Fee, Student Technology, and Instructional Curriculum and Materials.

CMO Fee reflects the management fee to be paid to Rooted School Foundation. In Year 0-2, the fee would be a 25% charge for RSF Team time and shift to a Monthly service fee of \$10,500 for Years 3 and beyond. Food service expense is estimated at \$4.20/student/day. Student technology allows

\$779/new student to increase the technology base plus an additional \$500/new classroom. Instructional Curriculum and Materials is modeled at an average of \$212/pupil.

For busing expense, we assumed we would need to purchase busses starting in Years 1-3. If the school shared space with Nevada Prep, we would pursue sharing bussing services in Year 1. We have included estimated costs for other operational costs such as food services, information technology providers, etc.

<u>Planning Year</u>

In our planning year, we have planned for salaries for the School Leader (full year) and Director of Operations (Winter 2022/2023 start date). We have included traditional start up expenses such as SIS implementation, staff recruiting, Board development, incorporation legal expenses and back office support. We have assumed a fee of \$107,500 to Rooted School Foundation to support the School Leader and launch activities during our planning year.

During the Incubation year, Rooted Clark County will hire a full-time School Leader and full-time Director of Operations. The School Leader and Director of Operations will be employed from January to June 2022. The Director of CTE will start in July 2022 with the rest of the founding team. CSP funds will cover the salaries for the School Leader and Director of Operations in the Incubation Year. Since the two roles will only be filled for ½ of the year, they are reflected on the budget as a .50 full time equivalent.

Budget Flexibility

The team is committed to financial sustainability, and one of the pillars of that work is contingencyplanning. Financial shocks could hit the school from a variety of sources, including enrollment shortfalls, state funding level declines (particularly due to secondary Corona virus impacts), fundraising shortfalls, and facilities cost overruns. The first line of defense against these shocks is the discipline the leadership team has adopted of building budgets with surpluses in all years. As the enrollment of the school grows, we are intentional about generating surpluses that create a fund balance that can be used to buffer financial shocks before making cuts to program.

We do recognize that in some instances, cuts can be necessary for charter schools to remain financially viable, and we have thought through progressions for that eventuality. Generally speaking, we would look first to non-academic positions and spending to defer or cut.

In Year 1, this would include adjusting our student technology plans to purchase lower cost devices. In the event of a significant enrollment shortfall, we would also look to right-size positions driven by enrollment ratios, reducing section count if necessary to maintain average class size at modeled levels.

Another strategy we would pursue is hiring hybrid teachers to teach multiple subjects such as a Humanities Teacher teaching English and Social Studies courses and a STEM teacher to teach Mathand Science courses.

<u>Reserves</u>

We have assumed a 4% carryover each year for reserves.

Attachment 19 Rooted Financial Plan

*Please see Budget Workbook Upload

Attachment 20 RSF Services Agreement

SERVICES AGREEMENT

RECITALS

WHEREAS, RSF was organized for charitable and educational purposes and, in particular, to foster and support public charter schools throughout the United States

WHEREAS, is Rooted School D/B/A Rooted School Clark County's authorized to operate public charter school(s) in XXXX (the "Charter School") as set ford in the Charter Contract dated July 1, 20XX, as amended, extended and renewed (the "Charter Contract");

WHEREAS, RSF and RS-CC desire to enter into this Agreement, whereby RSF will ide the "Services" (as further described in Article 1 and Exhibit A) to RS-CC with the goal stering educational excellence and innovation in the Stated

NOW, THEREFORE, in consideration of the shove and the mutual promises herein and in consideration of the representations, warranties, covenants, conditions, and nents herein contained, the Parties herein agree as follows: ade

AGREEMENT: ARTICLE 1 SERVICES

RESPONSIBILITIES.OF.RS.CC.

1.1 <u>Operations of RS.CC.</u> RS.CC. is responsible for overseeing all Charter School and all corporte activities, ind. Joperations of RS.CC. In determining RS.CC's operations and activities, RS.CC shulp-ing ood faith, consider the recommendations of RSF on issues including, but not limited to, pheliose, rules, regulations, proceedures, curriculum and bagters, subject to the constraints of graphicable law and the requirements of the relevant Charter Contract. If RS.CC chooses to sticping, dong or contrary to the maintenance of the high quality standards for the Charter School or contrary to the maintenance of the high quality standards for the Charter School set forth in the Trademark Linese Agreement, attached hereau, curriculum and request RS.CC to reconsider the paricular policy, rule, regulation, procedure, curriculum and operational objectives, then RSF may so notify RS-CC to affect School's on going programs and operational objectives, then RSF may, in its sole discretion, terminate this Agreement upon sixt/d600.days prior written notice to RS-CC.

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vided by RSF will be skilled and trained in the relevant professional discipline for the Services and compliant with all State and federal require

Services and compliant with all State and federal requirements. 1.8.3 <u>Compliance</u> RSF acknowledges that this Agreement is subject to the terms of the Charter Contract, other Federal and State laws and policy applicable to charter schools. In providing Services to RS-CC, RSF is responsible for selecting and retaining legal counsel to advise it regarding its responsibilities and obligations under this Agreement, the Charter Contract, and applicable law. RSF agrees that, to the extent applicable to the Services. If RS-CC, RSF will comply with the terms and provisions of the Charter Contract and other federal and State laws applicable to charter schools and the performance of the Service. If RS-CC is, at any time, determined to be out of compliance, each party shall promptly provide former to their if and when it has knowledge that RS-CC is out of compliance and RSF shall promptly cooperate to portect such deficiency and shall participate in any corrective action, para hardwork to the term of the Internal Revenue Service (TRSF) of any other that that agreement and other in the Internal Revenue Service (TRSF) of any other that that agreement and other in the Internal Revenue Service (TRSF) of any other that that agreement with the terms and proved by the aggregive to remedy such noncompliance to the extent that the opponenpliance and corrective action are related to the Service. RSF shall more that the opponenpliance and corrective that and the internal Revenue Service (TRSF) of any other that may ressult in hreach of the Charter Contract or other laws applicable to the Services or operation of the Charter School.

1.8.4 <u>Furnish Information</u>, RSF will threely provide RS-CC with all of the information that may be necessary (i) to fulfall RS-CC's reporting requirements under the Charter Contract; (iii) for the applicable charter subscrize or State or Federal agency's oversight of Charter School operations or RS-CC; and (iii) to comply with the Charter Contract and/or applicable law; including the Internal Rescribe Code. Additionally, RS-CC may request, upon reasonable notice, RSF to attend meetings of the Doard to provide reports on operations at the Charter School(s), updates on new choles or materials on other matters related to the Services.

1.8.5 <u>Accutations</u>. All property or assets acquired by RSF with its own funds in connection with this Agreement shall be owned by and remain the property of RSF.

1.8.6 Communication and Notice, RSF agrees to communicate with RS-CC and timely notify RSC CC of any anticipated or known: (i) material health or safety issues; (ii) labor, employee or funding problems; and (iii) problems of any other type that could adversely affect RS-CC on the Charter Contract.

1.8.7 <u>RSF Offices</u>, RSF reserves the right to maintain offices at each Charter School for administrative services at such Charter School, as RSF determines necessary or appropriate. RSF may maintain other offices at other locations.

1.8.8 <u>Other Services.</u> The Services to be provided by RSF to RS-CC under this Agreement comprise only those duties, responsibilities and obligations of RSF expressly stated herein. RSF shall not be obligated to provide any additional or other services to RS-CC except as may be mutually agreed in writing between RSF and RS-CC. 3

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1.2 <u>Cooperation</u>, RS-CC shall cooperate with RSF in promptly furnishing all formation and documents and submitting all forms and reports that may be necessary or nvenient for RSF to perform its responsibilities under this Agreement properly. in formati

1.3 Legal Counsel RS-CC is responsible for selecting, retaining and payment of fees for its local legal counsel to advise it regarding its rights and responsibilities under this Agreement and applicable law. RSF is responsible for selecting, retaining and payment for fees for its legal counsel to advise it regarding its rights and responsibilities under this Agreement, applicable law and with respect to ongoing School operations.

1.4 <u>Charter Contract</u>. Neither RSF nor RS-CC shall act, or fail to act, in any manner that may result in a breach of any Charter Contract or applicable law.

1.5 <u>Evaluation of RSF</u>. At its sole option and expense, RS CC may conduct an annual review of the performance of RSF in terms of RSF's compliance, with the terms of this Agreement and applicable construments of the applicable contractinguistorizer(s). If such annual review is conducted, RSF will be evaluated against a set of methods, to include academic metrics, to be mutually agreed upon by RS-CC and RSF, subject to/change annually as desired and agreed to by both parties. Should RSF fail to meet the signed to and required metrics. RSF and RS-CC shall prepare a mutually agreed upon to proceeding agreed to be provided and the set of the signed of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of t

1.6 <u>Place of Performance</u>. The Parties has been approximately approximately provide for reasonable and necessary affice and administrative space to perform the Services. Except as prohibited by the Charter Contract or other applicable law, RSF reserves the right to perform a portion of the Services off-site at other locations and outside the State of Louisiana.

1.7 <u>Communication and Notice</u>, RS-CC agrees to communicate with RSF and timely notify RSF of any anticipated or Known: (i) material health or safety issues; (ii) labor, employee or funding problems; and (iii) problems of any other type that could adversely affect RSF in complying with or performing its obligations and responsibilities hereunder.



1.8.1 RSF shall provide RS-CC with the "Services," as expressly delineated and defined on Exhibit "A" hereto and incorporated herein by this reference.

1.8.2 In entering into this Agreement RS-CC is relying on RSF's expertise, skill and professional competence in the areas of educational services of charter schools. RSF will provide the Services in a competent, timely and efficient manner in accordance with the standard of performance within the industry. RSF agrees that any contractors, faculty or staff skill and professio

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ARTICLE 2 COMPENSATION

2.1 The School shall pay RSF a fee for Services equal to \$115,500.00 over the Term rther defined herein) of this Agreement (the "Fee") in accordance with the forth-(as further defin

Invoice Date	Amount	
September 1, 20XX	\$28,875.00	A.
December 1, 20XX	\$28,875.00	0
March 1, 20XX	\$28,875.00	2×
June 1, 20XX	\$28,875.00	

2.2 <u>Invoices.</u> RSF shall submit invoices imaccordance with the above payment schedule. Each invoice will include the payment tus date. RSF reserves the right to stop work and terminate this Agreement in writing if an invoke is 45 days or more past due.
2.3 In the event of any material change in the level or scope of RSF's services, the Parities agree to negotiate in good faith an appropriate adjustment to the compensation amount under this Article to reflect the additional or reduced services to be provided by RSF. No material change affecting the compensation amount will be made without the mutual consent of RSF and the School.
2.4 The Partine agree date.

2.4 The Parties agree that based on a comparison of services to be performed and other organizations available and reported fees, that the compensation fee described above is fair, reasonable, and not excessive.

2.5 <u>RSFFs Other Clients</u>. The School acknowledges that RSF may have other set and non-school clients. RSF shall maintain separate accounts for each client and shall charge the School for expenses incurred by or on behalf of the School.

ARTICLE 3 EXCLUDED SERVICES

3.1 Other than the Services outlined herein, RSF is not responsible for any other activities unless mutually agreed to in writing.

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ARTICLE 4 INSURANCE

4.1 <u>General Liability Insurance</u>, Each Party shall, at its own expense, maintain general liability insurance, including, without limitation, bodily injury and property damage insuring itself with a minimum of \$1,000,000.00 per occurrence and \$2,000,000.00 aggregate limit of liability coverage. Each Party shall provide the other Party with a certificate evidencing such insurance and showing the other Party as an additional insured. . >

4.2 Workers' Compensation Insurance RSF shall maintain workers' compensation insurance where required by law to cover its employees and shall provide the other Party with a certificate or certificates of such insurance. The cost of such insurance shall be paid as specified herein.

4.3 <u>Automobile Insurance</u>. Each Party shall, at its own expense, maintain comprehensive automobile insurance, insuring itself with a minimum of \$1,000,000.00 combined single certificate evidencing such insurance and showing the other Party as an additional insured.

4.4 <u>Directors' and Officers' Liability Insurance</u>. The School shall procure and maintain a policy of Directors and Officers' ("D&O) Liability Insurance for the School. Such insurance shall provide a minimum of \$5,000,000.00 coverage.

4.5 <u>Cancellation: Subrogation</u> Each insurance policy required herein shall provide for not less than 10 days written notice to the wher Party in the event of cancellation or material change of coverage. To the maximum extent permitted by its insurance policies, each Party, for the benefit of the other Party, waives any and all rights of subrogation which might otherwise exist (and the certificate required herein shall indicate such waiver of subrogation).

ARTICLE 5 INDEMNIFICATION

INDEMNIFICATION 5.1 Each party agrees that the fullest extent permitted by law, it will indemnify, defend, save and hold the other Party, and its directors, officers, employees, agents and other representatives hirmless for, from and against any and all manner of loss, cost, expense (including uttorneys' fees and other costs and expenses of litigation, defense and appeal), damage, rigity, liability, claims, actions and causes of action whatooever arising from or in any way related to the indemnifying Party's: (i) negligent or willful acts or omissions; or (ii) breach of the Agreement.

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ARTICLE 6 TRADEMARKS

6.1 $\,$ $\,$ The Parties' respective rights to use RSF marks are set forth in, and governed by, the attached Trademark Licensing Agreement.

ARTICLE 7 TERM

, P

7.1 Term. Unless earlier terminated as provided herein, the Term of this Agreement shall commence on July XX, 20XX and shall run through June XX, 20XX. RSN's Services shall cease on the termination of this Agreement, regardless of the reason, RSF shall be entitled to, and shall promptly receive, all feer madreimbursement of all expenses pursuant to Article 2 due and payable through the effective date of expiration or termination.

P ARTICLE 8 TERMINATION 8.1 This Agreement may be terminated as follows:

8.1.1 Agreement. Without further liability to either Party, either Party has the right to terminate the Agreement: 1

the right to terminate the Agreement: a. If, at my time, the School determines that this Agreement would serve as grounds for revocation of Chahrer Contract, would jeopardize its tax-exempt status as a Section 501(c)(3) tax-exempt organization, would jeopardize the tax exempt status of interest on any debt issued for the benefit of the School, would create adverse tax consequences for the School, or would cause the Sobool to be in violation of applicable law, the School may terminate this Agreement in accordingene with this Article. The School shall give RST at least minety (90) days notice of its infield to terminate the Agreement pursuant to this Article. In addition, the School shall provade RSF with an analysis as to why such acciton is necessary. If requested by RSF, the School shall meet and confer with RSF to determine whether some other course of action could by taken which might satisfy the School concerns and the parties shall work together in good faith to resolve or satisfy any such concerns before a termination is pursued; or

b. If a Party is in breach of a material provision of this Agreement and has failed (a) to cure the breach within sixty (60) days of notice ("Cure Period") from the non-breaching Party specifying the breach or (b) to take substantial steps toward a cure within the Cure Period if the breach is incapable of cure within the Cure Period.

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8.1.2 <u>Non-Appropriation Clause</u>. Without further notice and without further liability to either Party, this Agreement, with respect to any individual and specific charter contract, shall terminate if:

a. The legislature of the applicable jurisdiction fails to appropriate funds for the operation of that charter school. In such an event, the obligations of the Parties with respect to the effected School(s) by the non-appropriation shall terminate on the last difte that such government funds are appropriated for the operation of Schools covered by that charter contract; or

b. The School's Charter Contract is revoked or the renewed, or is surrendered after receiving a Notice of Intent to Revoke Charter or Notice of Intent to Non-Renew, by or from the charter authorizing jurisdiction. In such an event, the obligations of the Parties with respect to the effected School(s) shall terminate on the Such effective Charter Contract expires or on the date of revocation, non-renewal, or surrender, a provision of the Agreement that affects only that particular School, and has failed (a) to cure the mean within the Cure Period from the such explanation of the Agreement that a provision of the Agreement that affects only that particular School, and has failed (a) to cure the mean the such that of the such that and the such that affects the such that of the such that affects the such that of the such that affects the such that affects the such that affects the such that affects the such that affects the such that affects the such that affects the such that affects the such that affects the such that affects the such that affects the such that affects the such that affects the such that affects the such that affects the such that affects the such that affects the such that affects the such that affects the such that affects the such that affects the such that affects the such that affects the such that affects the such that affects the such that affects the such that affects the such that affects the such that affects the such that affects the such that affects the such that affects the such that affects the such that affects the such that affects the such that affects the such that affects the such that affects the such that affects the such that affects the such that affects the such that affects the such that affects the such that affects the such that affects the such that affects the such that affects the such that affects the such that affects the such that affects the such that affects the such that affects the such that affects that the such that affects that affects that the such th from the non-breaching Party specifying the breach, or (b) to take substantial steps toward a cure within the Cure Period if the breach is incapable of cure within the Cure Period.

c. Severability of Services Provided to Separate Schools. Breach or termination of this Agreement and services to any particular School shall have no effect on any other Schools serviced hereunder, all of which shall remain in force in accordance with their respective terms.

respective terms. d. Remoty, for Breach of Trademark License Agreement or Copyright License Agreement, fit, st. any time, the School breaches the Trademark License Agreement between the School and RSF, and fails to remedy such breach(es) in accordance with the terms of the Trademark License Agreement, RSF may immediately terminate this Services Agreement. ARTICLE 9 DEFAULT 9.1 Default A "Default" is defined as the failure by a Party to observe, comply with or perform any of the terms, covenants or conditions applicable to such Party under this Aggreement. Specific Defaults and cure periods are set forth below: 0.1.1 The followed to be the terms of the terms of the terms of the terms of the terms of the terms of the terms of the terms of the terms of the terms of the terms of the terms of the terms of the terms of the terms of the terms of the terms of the terms of the terms of the terms of the terms of the terms of the terms of the terms of the terms of the terms of the terms of the terms of the terms of the terms of the terms of the terms of the terms of the terms of the terms of the terms of the terms of the terms of the terms of the terms of the terms of the terms of the terms of the terms of the terms of the terms of the terms of the terms of the terms of the terms of the terms of the terms of the terms of the terms of the terms of the terms of the terms of the terms of the terms of the terms of the terms of the terms of the terms of the terms of the terms of the terms of the terms of the terms of the terms of the terms of the terms of the terms of the terms of the terms of the terms of the terms of the terms of the terms of the terms of the terms of the terms of the terms of the terms of the terms of the terms of the terms of the terms of the terms of terms of the terms of the terms of the terms of the terms of the terms of the terms of terms of the terms of terms of terms of the terms of terms of the terms of terms of terms of terms of the terms of terms of terms of terms of terms of terms of t

9.1.1 The failure by the School to make any payment under this Agreement or to reimburse any cost or expenses as and when due, where such failure continues for a period of 5 calendar days following notice thereof to the School by or on behalf of RSF;

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obligation under this Agreem

ooligation under this Appeenters, Party of any general arrangement or assignment for the benefit of creditors; (ii) a Party becomes a "debro" as defined in 11 U.S. Code Section 101 or any successor statute thereto (unless, in the case of a petition filed against such Party, the same is dismissed within innet(y00) days) (iii) the appointment of a trustee or the judicial appointment of a receiver to take possession for substantially all of a Party's assets, where possessions in not restored to such Party within finite(y00) (90) days; or (iv) the attachment, execution or other judicial seizure of substantially all of a Party's assets, where such seizure is not discharged within ninety (90) days; the section of the section of the section of the section of the section of the section of the section of a Party's assets, where such seizure is not discharged within ninety (90) days; the

9.1.2 The failure by either Party to observe, comply with or perform any

9.1.4 Any action by the School to remove or otherwise limit the authority or role of RSF under the School articles of incorporation or bylaws; or 9.1.5 The failure of the School to timely pay any of its obligations associated with the construction, acquisition, equipment or retroation of any facilities whether directly financed or leased,

9.2 <u>Remedies</u>. If either Party defaults hereunder, the non-defaulting Party may, at its option (but without obligation to do so), perform useh duty or obligation on the defaulting Party is behalf. The costs and expenses of any such performance shall be due and payable by the defaulting Party to the other Party immediately on invoice therefore. In the event of a Default of this Agreement by either Party (which is not timely cured), with or without further notice or demand, the non-defaulting Party may haritie any remedy now or hereafter available to such Party under the laws or judicial decision of the State.

GENERAL PROVISIONS

ARTICLE 10 CENERAL PROVISIONS 10.1 <u>Governing taw</u>. This Agreement and any dispute arising from the performance or breach hereof or thereof shall be governed by, and construed and enforced in accordance with, the laws of the State of Louisiana, without reference to conflicts of laws.

Journe up performance
 Journey of Louisiana, without reference to conflicts of laws.
 10.2 Netices. All communications and notices relating to this Agreement are to be
delivered in writing, with confirmation of delivery, to the following address or another address as
either Party may designate from time to time.
 If to RSF, then ter-

Jonathan Johnson Rooted School Foundation 4238 St. Charles Avenue New Orleans, LA 70115

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DRAFT-04.07.2022 DRAFT - 04.07.2022 10.6 <u>Counterparts</u>: Third Party Beneficiaries. This Agreement may be signed in any number of counterparts, each of which shall be an original, with the same effect as if the signatures thereto and hereto were upon the same instrument. This Agreement may be transmitted to the Parties by facisimile or other electronic means, and such signatures transmitted by facisimile or other electronic means, and such signatures transmitted by facisimile or other electronic means, and such signatures transmitted by facisimile or other electronic means, and such signatures and effect as an original signature this Agreement. No provision of this Agreement intended to confer upon any person or entity other than the Parties hereto any rights downnotics hereunder. iiohnson@rootedschool.org - APPROVAL With a copy to its counsel: Patty McMurray and Melissa Grand Baker Donelson Bearman Caldwell & Berkowitz, PC 450 Laurel Street, 21 st Floor Baton Rouge, Louisiana 70801 pmemurray@bakerdonelson.com mgrand@bakerdonelson.com 10.7 <u>Assignment</u>. This Agreement may not be assigned by either Party without the vritten consent of the other Party. prior written o If to RS-CC, then to: 10.8 <u>No Implied Waivers; Rights Cumulative</u>. No failure on the part of any Party to exercise and no delay in exercising any right under this Agreements on provided by statute or at law or in equity or otherwise, shall impair, prejudice or constitute awaiver of any such right, nor shall any partial exercise of any such right preclude any other or further exercise thereof or the With a copy to its counsel: exercise of any other right. S 10.9 <u>Relationship of the Parties.</u> 10.9.1 <u>Independent Contractors</u>. Nothing contained in this Agreement is intended implicitly, or is to be construct, to constitute the Parties as partners or create a joint-venture in the legal sense. No Party hereto shall have any express or implied right or authority to assume or create any obligations on helta?¹⁶ or in the name of any other Party or to bind any other Party to any contract, agreement or undertaking with any third party. 10.3 <u>Dispute Resolution and Jariodiction</u>. Unless the parties mutually agree otherwise, any controversy arising out of or relating to this Agreement or to breach, termination, or validity of this Agreement, may be adjudgended only in a Louisame court, state or federal, having jurisdiction over the subject matter. Both parties consent to the jurisdiction and venue of such a 10.9.2 The school designates RSF and its administrators and staff as agents of the School having a legitimate éducational interest for the purpose of entitling such persons, access to education records under The Family Educational Rights and Privacy Act, 20 U.S.C. §1222g ("FERPA"), and Under applicable state law. RSF shall comply with all applicable FERPA and state law requirements. court. \smile court. 10.4 <u>Severability</u>. If the event any provision of this Agreement is found to be invalid, illegal or unenforceable, in any jurisdiction, then in lieu of each such invalid, illegal or enforceable provision there shall be added automatically as a part of this Agreement a valid, legal and enforteable substitute provision that most nearly reflects the original intent of the parties and all helper provisions hereof shall remain in full force and effect in such jurisdiction and shall besherfully construed in order to carry out the intentions of the parties hered as nearly as may be possible. Such invalidity, illegality or unenforceability shall not affect the validity, legality userinforceability of such provision in any other jurisdiction. 10.5 <u>Modifications; Waivers</u>. No amendment, modification or waiver of any provision of this Agreement shall be effective unless made in writing signed by all Parties hereto. No provision of this Agreement shall be varied, contradicted or explained by any oral agreement, course of dealing or performance or any other modes forth in an agreement in writing and signed by all Parties. 10.10 <u>School Records</u>, Financial, educational and other records pertaining to the School, whether on not generated or maintained by RSF, are School property, and such records may be subject to tespection and copying under applicable law. School records will be kept and maintained at each School and/or on School property. The physical location and access to all records of the School shall fully comply with applicable laws. upon expiration or earlier termination of this Agreement, RSF shall, within 30 days, turn over to the School all School all records in whatever form (on paper, electronic or otherwise), which shall be retained by the School and thereafter maintained by the Board. RSF may make and keep one copy of all books and records that the School is permitted to retain under applicable law. 10 9 Services Agreement Services Agreement 4876-3336-2454v1 4876-3336-2454v1 258685-000001 03/17/2022 8685-000001 03/17/2022

10.10.1 Student Data Privacy; Personally Identifiable Information.

a. RSF shall not allow access to, release, or allow the release of student information to any person or entity except as specified in this agreement, or as required by law.

b. RSF agrees not to sell, transfer, or process any student information for use in commercial advertising, marketing, or any other commercial purpose, unless otherwise permitted by this agreement, or by federal, state, or local law. c. RSF agrees to create and maintain acrees and access authentication policies for its computer system(s) that ensure only authorized individuals have access to student information. d. Authorized individuals include these authorized by the School and employees or agents of RSF who require access to fulfill the intent of this agreement.

Compared with all gederal, state, and local laws and the results of privacy and security audits on its computer systems that may be required by the School.

 E. RSF agrees to provide the results of privacy and security audits and the school.

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g. RSF agrees to job in place safeguards on its computer systems against the breach of student information privacy. In the event of a breach of the privacy of student information, RSF agrees to immediately alert the School and to work with the School to remediate said breach.

this agreement with the School and to delete all student information as required by upon termination of this agreement. All information removed from RSF's servers upon termination of this agreement will be returned to the School.

10.11 <u>Inthe Agreement</u>. This Agreement embodies the entire understanding between the Parties with respect to the Services and supersedes all previous communications, representations or understandings with respect thereto, either oral or written.

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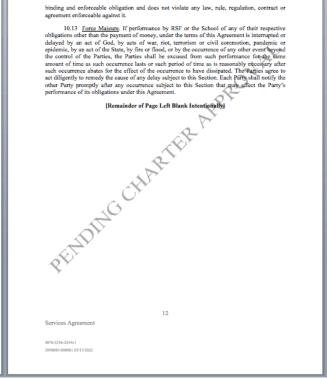
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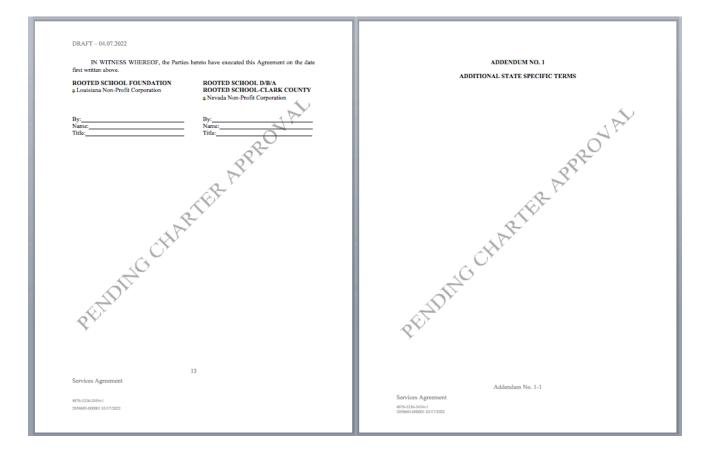
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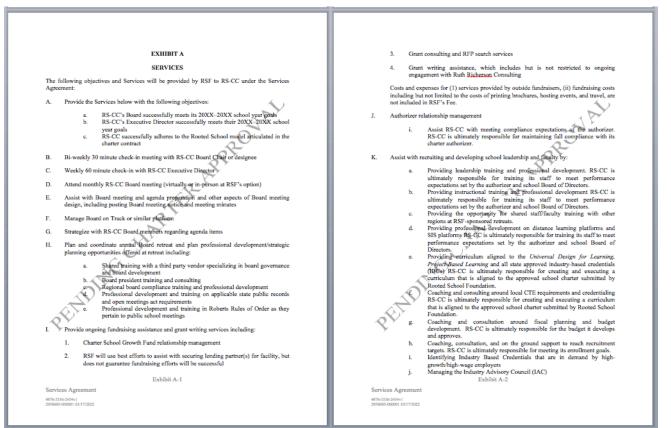
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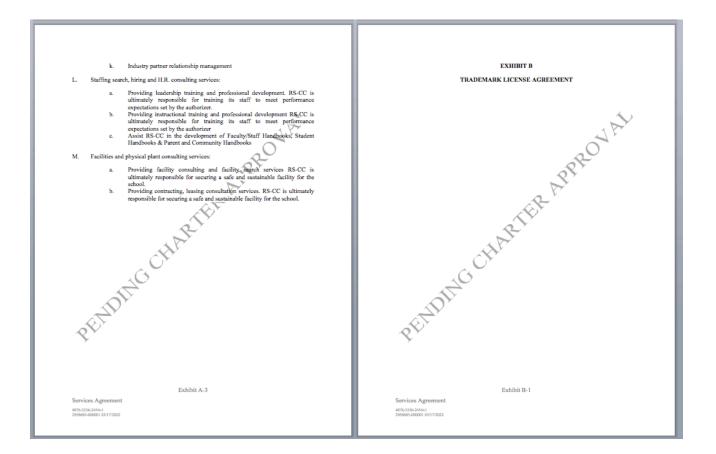
binding and enforceable obligation and does not violate any law, rule, regulation, contract or agreer nt enforceable against

10.13 Force Maigues, If performance by RSF or the School of any of their respective obligations other than the payment of money, under the terms of this Agreement is interrupted or delayed by an act of God, by acts of war, rick terrorism or civil commotion, pandemic or epidemic, by an act of He State, by fire or flood, or by the occurrence of any other event Paynel the control of the Parties, shall be vertualed for any other event Paynel the control of the Parties, the Parties shall be excused from such performance for the gains and the effect of the occurrence lasts or such period of time as is reasonably ticespary after such occurrence abutes for the effect of the occurrence to this Section. Each pirity shall notify the other Party promptly the cause of any observent this Section that, pay, affect the Party's performance of its obligations under this Agreement.



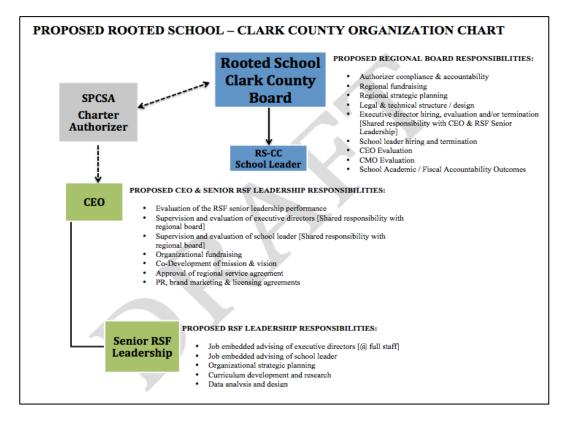


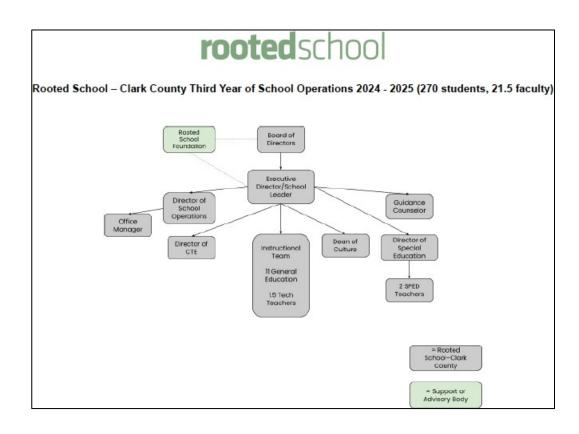


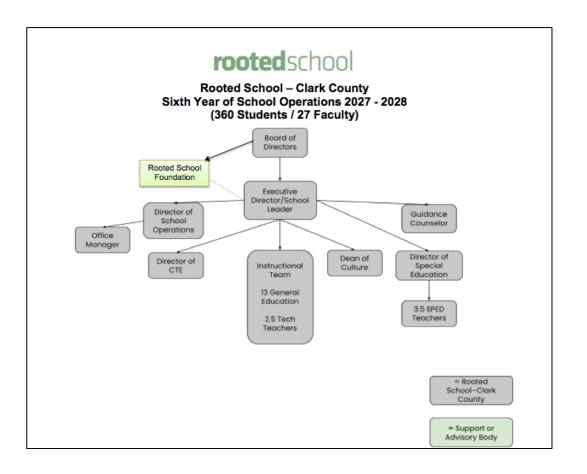


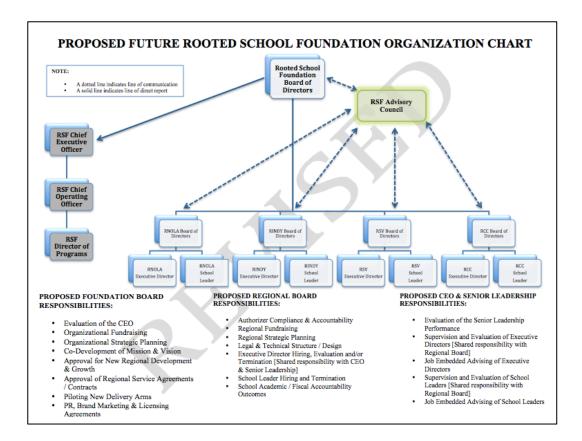
Attachment 21 Organizational Charts

RS-CC Year Organizational Chart - DRAFT









Attachment 22 **RS-CC** Sample Services Agreement

SERVICES AGREEMENT

RECITALS

WHEREAS, RSF was organized for charitable and educational purposes and, in particular, to foster and support public charter schools throughout the United States

WHEREAS, is Rooted School D/B/A Rooted School-Clark County is authorized operate public charter school(s) in XXXX (the "Charter School") as set forth in the Cha Contract dated July 1, 20XX, as amended, extended and renewed (the "Charter Contract"); suthorized to

WHEREAS, RSF and RS-CC desire to enter into this Agroument, whereby RSF will rovide the "Services" (as further described in Article 1 and Exflut A) to RS-CC with the goal f fostering educational excellence and innovation in the States

NOW, THEREFORE, in consideration of the above and the mutual promises herein made, and in consideration of the representations, warranties, covenants, conditions, and agreements herein contained, the Parties herein agree as follows:

AGREEMENT:

SERVICES RESEONSIBILITIES.OF.RS.CC.

 <u>Operations of RS.CCC, RS.CCC</u> responsible for overseeing all Charter School and all corporate activities, and operations of RS-CC. In determining RS-CC's operations and activities, RS-CC shall-in good faith, consider the recommendations of RSF on issues including, activities, RS-CC shult-in good faith, consider the recommendations of RSF on issues including, but not limited to polioies, rules, regulations, procedures, curriculum and budgets, subject to the constraints of applicable law and the requirements of the relevant Charter Contract. If RS-CC chooses to adopt one or more policies, rules, regulations, procedures, curricula and/or budgets other than different economended by RSF and RSF believes such adoption to be contrary to the beat interest of the Charter School or contrary to the maintenance of the high quality standards for the Charter School set forth in the Trademark License Agreement, attached hereto as Exhibit B ("TM_Agreement"), then RSF may so notify RS-CC in writing of the basis for such position, and request RS-CC to reconsider the particular policy, rule, regulation, procedure, curriculum and/or budget item. If after such a request RS-CC determines to affirm its prior decision, and RSF determines RS-CC's alternative is not a viable alternative for the Charter School's ongoing programs and operational objectives, then RSF may, in its sole discretion, terminate this Agreement upon sixty.(50).days prior written notice to RS-CC.

Services Agreement

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1.2 Cooperation. RS-CC shall cooperate with RSF in promptly furnishing all information and documents and submitting all forms and reports that may be necessary or convenient for RSF to perform its responsibilities under this Agreement properly.

1.3 Legal Counsel, RS-CC is responsible for selecting, retaining and payment of fees for its local legal counsel to advise it regarding its rights and responsibilities under this Agreement and applicable law. RSF is responsible for selecting, retaining and payment of fees for its legal counsel to advise it regarding its rights and responsibilities under this Agreement. applicable law and with respect to ongoing School operations

1.4 <u>Charter Contract</u>. Neither RSF nor RS-CC shall act, or fail to act in any manner that may result in a breach of any Charter Contract or applicable law.

1.5 <u>Evaluation of RSF</u> At its sole option and expense, RS CC may conduct an annual review of the performance of RSF in terms of RSF's compliance, with the terms of this Agreement and applicable requirements of the applicable charter authorizer(s). If such annual review is conducted, RSF will be evaluated against a set of medities, to include academic metrics, to be mutually agreed upon by RS-CC and RSF, subject to/change annually as disred and agreed to by both parties. Should RSF fail to meet the applicable to and required metrics. RSF and RS-CC shall prepare a mutually agreed upon correctly action plan.

1.6 Place of Performance. The Parties shall, by separate agreement, work together in 1.0 <u>Finite or reitorimance</u> interimation of an energy and administrative space to perform the Services. Except as prohibited by the Charter Contract or other applicable law, RSF reserves the right to perform a portion of the Services off-site at other locations and outside the State of Louisiana.

1.7 <u>Communication and Notice</u>, RS-CC agrees to communicate with RSF and timely notify RSF of any anticipated or Known: (i) material health or safety issues; (ii) labor, employee or funding problems; and (iii) problems of any other type that could adversely affect RSF in complying with or performing its obligations and responsibilities hereunder.

RESPONSIBILITIES OF RSF.

1.8 Services. 1.8.1

RSF shall provide RS-CC with the "Services," as expressly delineated and defined on Exhibit "A" hereto and incorporated herein by this referer

1.8.2 In entering into this Agreement RS-CC is relying on RSF's expertise, skill and professional competence in the areas of educational services of charter schools. RSF will provide the Services in a competent, timely and efficient manner in accordance with the standard of performance within the industry. RSF agrees that any contractors, faculty or staff

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provided by RSF will be skilled and trained in the relevant professional discipline for the Services and compliant with all State and federal requ

Services and compliant with all state and tederal requirements. 1.8.3 <u>Compliance</u>, RSF acknowledges that this Agreement is subject to the terms of the Charter Contract, other Federal and State laws and policy applicable to charter schools. In providing Services to RS-CC, RSF is responsible for selecting and retaining legal counsel to advise it regarding its responsibilities and obligations under this Agreement, the Charter Contract, and applicable law. RSF agrees that, to the extent applicable to the Services, RSF will comply with the terms and provisions of the Charter Contract and other federal and State laws applicable to charter schools and the performance of the Services. IF RS_CC, is, at any time, determined to be out of compliance, each party shall promptly provide pother to the other if and when it has knowledge that RS-CC is out of compliance and RSF shall aromytely cooperate to correct such deficiency and shall participate in any corrective action plan approved by the applicable charter authorizer, the Internal Revenue Service ("IRSF) for any other federal or State agency, to remedy such noncompliance to the extent the concompliance and corrective action are related to the Services. RSF shall not act, or fail to act, fu any manner that may result in breach of the Charter Contract or other laws applicable to the Services or operation of the Charter School. Charter School.

1.8.4 <u>Furnish Information</u>. RSF will timely provide RS-CC with all of the information that may be necessary (i) to fulfall RS-CC's reporting requirements under the Charter Contract; (ii) for the applicable charter authorizer or State or Federal agency's oversight of Charter School operations or RS-CC; and (iii) to comply with the Charter Contract and/or applicable internal Response Code. Additionally, RS-CC may request, upon reasonable notice, RSF to attend meetings of the Board to provide reports on operations at the Charter School(s), updates on new schools or materials on other matters related to the Services.

1.8.5 <u>Accutations</u>. All property or assets acquired by RSF with its own funds in connection with this Agreement shall be owned by and remain the property of RSF.

1.8.6 <u>Communication and Notice</u>. RSF agrees to communicate with RS-CC and timely notify RS-CC of any anticipated or known: (i) material health or safety issues; (ii) labor, employee or funding problems, and (iii) problems of any other type that could adversely affect RS-CC on the Charter Contract.

1.8.7 <u>RSF Offices</u>, RSF reserves the right to maintain offices at each Charter School for administrative services at such Charter School, as RSF determines necessary or appropriate. RSF may maintain other offices at other locations.

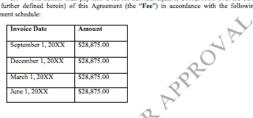
7 1.8.8 <u>Other Services.</u> The Services to be provided by RSF to RS-CC under this Agreement comprise only those duties, responsibilities and obligations of RSF expressly stated herein. RSF shall not be obligated to provide any additional or other services to RS-CC except as may be mutually agreed in writing between RSF and RS-CC.

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ARTICLE 2 COMPENSATION

2.1 The School shall pay RSF a fee for Services equal to \$115,500.00 over the Term (as further defined herein) of this Agreement (the "Fee") in accordance with the following with the following payment schedule:



2.2 <u>Invoices.</u> RSF shall submit invoice, in accordance with the above payment schedule. Each invoice will include the payment 'dub date. RSF reserves the right to stop work and terminate this Agreement in writing if an invoke is 45-days or more past due.

2.3 In the event of any material change in the level or scope of RSF's services, the Parties agree to negotiate in good faith an appropriate adjustment to the compensation amount under this Article to reflect the additional or reduced services to be provided by RSF. No material change affecting the compensation amount will be made without the mutual consent of RSF and the School.

2.4 The Parties agree that based on a comparison of services to be performed and other organizations available and reported fees, that the compensation fee described above is fair, reasonable, and not excessive.

2.5 <u>RSIFs Other Clients</u>. The School acknowledges that RSF may have other school and non-school felents. RSF shall maintain separate accounts for each client and shall only charge the School for expenses incurred by or on behalf of the School. V

ARTICLE 3 EXCLUDED SERVICES

3.1 Other than the Services outlined herein, RSF is not responsible for any other activities unless mutually agreed to in writing.

Services Agreement

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ARTICLE 4 INSURANCE

4.1 <u>General Liability Insurance</u>. Each Party shall, at its own expense, maintain general liability insurance, including, without limitation, bodily injury and property damage insuring itself with a minimum of \$1,000,000.00 per occurrence and \$2,000,000.00 aggregate limit of liability coverage. Each Party shall provide the other Party with a certificate evidencing such insurance and showing the other Party as an additional insured.

4.2 <u>Workers' Compensation Insurance</u>. RSF shall maintain workers' compensation insurance where required by law to cover its employees and shall provide the other Party with a certificate or certificates of such insurance. The cost of such insurance shall be paid as specified herein.

herein. 4.3 <u>Automobile Insurance</u>. Each Party shall, at the own expense, maintain comprehensive automobile insurance, insuring itself with a trainmum of \$1,000,000.00 combined single certificate evidencing such insurance and showing the other Party as an obtained the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state of the state additional insured.

4.4 <u>Directors' and Officers' Liability Insurance</u>. The School shall procure and maintain a policy of Directors and Officers' ("D&OD Liability Insurance for the School. Such insurance shall provide a minimum of \$5,000,000.00 coverage.

4.5 <u>Cancellation: Subrogation</u>. Each insurance policy required herein shall provide for not less than 10 days written notice to the other Party in the event of cancellation or material change of coverage. To the maximum event permitted by its insurance policies, each Party, for the benefit of the other Party, writes any and all rights of subrogation which might otherwise exist (and the certificate required herein shall indicate such waiver of subrogation). <u>_</u>C

ARTICLE 5 INDEMNIFICATION

5.1 Each Party agrees that the fullest extent permitted by law, it will indemnify, defend, save and hold the other Party, and its directors, officers, employees, agents and other presentary sharmless for, from and against any and all manner of loss, cost, expense (including automeys' fees and other costs and expenses of litigation, defense and appeal), damake injury, liability, claims, actions and causes of action whatsoever arising from or in any way related to the indemnifying Party's: (i) negligent or willful acts or omissions; or (ii) breach of the Agreement.

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ARTICLE 6 TRADEMARKS

6.1 The Parties' respective rights to use RSF marks are set forth in, and governed by, the attached Trademark Licensing Agreement.

ARTICLE 7 TERM

7.1 <u>Term</u>. Unless earlier terminated as provided herein, the Term of this Agreement shall commence on July XX, 20XX and shall run through June XX, 20XX. RSF's Services shall cease on the termination of this Agreement unless the term of this Agreement is renewed or extended as provided herein. On expiration or termination of this Agreement, regardless of the reason, RSF shall be entitled to, and shall promptly receive, all feet and reimbursement of all expenses pursuant to Article 2 due and payable through the offschize date of expiration or termination.



8.1 This Agreement may be terminated as follow

8.1.1 Agreement. Without further liability to either Party, either Party has the right to terminate the Agreement: 1

the right to terminate the Agreement: a. If, at any time, the School determines that this Agreement would serve as grounds for revocation of a Charter Contract, would jeopardize its tax-exempt status as a Section 501(c)(3) tax-exempt dynamization, would jeopardize the tax exempt status of interest on any debt issued for the benefit of the School, would create adverse tax consequences for the School, or would cause the School to be in violation of applicable law, the School may terminate this Agreement in accordance with this Article. The School shall give RSF at least ninety (90) days notice of its, fince to terminate the Agreement pursuant to this Article. In addition, the School shall provide RSF with an analysis as to why such action is necessary. If requested by RSF, the School shall meet and confer with RSF to determine whether some other course of action could be taken which might satisfy the School concerns before a termination is pursued; or together in good faith to resolve or satisfy any such concerns before a termination is pursued; or

b. If a Party is in breach of a material provision of this Agreement b. If a Party is in breach of a material provision of this Agreement and has failed (a) to cure the breach within sixty (60) days of notice ("Cure Period") from the non-breaching Party specifying the breach or (b) to take substantial steps toward a cure within the Cure Period if the breach is incapable of cure within the Cure Period.

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8.1.2 <u>Non-Appropriation Clause</u>. Without further notice and without further liability to either Party, this Agreement, with respect to any individual and specific charter contract, shall terminate if:

The legislature of the applicable jurisdiction fails to appropriate funds for the operation of that charter school. In such an event, the obligations of the Paries with respect to the effected School(s) by the non-appropriation shall terminate on the last date that such government funds are appropriated for the operation of Schools covered by that charter contract; or

b. The School's Charter Contract is revoked or not renewed, or is surrendered after receiving a Notice of Intent to Revoke Charter or Notice of Intent to Non-Renew, by or from the charter authorizing jurisdiction. In such an event, the obligations of the Parties with respect to the effected School(s) shall terminate on the date the Charter Contract Parties with respect to the effected School(s) shall terminate on the quetter Contract expires or on the date of revocation, non-renewal, or surrender, as applicable; or the other Party is in breach of a material provision of the Agreement, or a provision of the Agreement that affects only that particular School, and has failed (a) to cure the reach within the Cure Period from the non-breaching Party specifying the breach, or (b) to take substantial steps toward a cure within the Cure Period if the breach is incapable of cure within the Cure Period.

c. Severability of Services Provided to Separate Schools. Breach or termination of this Agreement and services to any particular School shall have no effect on any other Schools serviced hereunder, all of which shall remain in force in accordance with their respective terms.

d. Remove for Breach of Trademark License Agreement or Copyright License Agreement, ff, at any time, the School breaches the Trademark License Agreement between the School and RSF, and fails to remody such breach(es) in accordance with the terms of the Trademark License Agreement, RSF may immediately terminate this Services Agreement. amark T

ARTICLE 9 DEFAULT

9.1 Default A "Default" is defined as the failure by a Party to observe, comply with or perform any of the terms, covenants or conditions applicable to such Party under this Agreement, here such Party fails to cure such Default within the applicable grace period specified herein, and shall entitle the non-defaulting Party to pursue the remedies set forth in this Agreement. Specific Defaults and cure periods are set forth below:

9.1.1 The failure by the School to make any payment under this Agreement or to reimburse any cost or expenses as and when due, where such failure continues for a period of 5 calendar days following notice thereof to the School by or on behalf of RSF;

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9.1.2 The failure by either Party to observe, comply with or perform any obligation under this Agreement,

9.1.3 The occurrence of any of the following events: (i) the making by a Party of any general arrangement or assignment for the benefit of creditors; (ii) a Party becomes Party or any general arrangement or assignment for the benefit or creditors; (ii) a 'arry becomes a 'debtor' as defined in 11 U.S. Code Section 101 or any successor statute thereto (unless, in the case of a petition filed against such Party, the same is dismissed within ninety (90) days); (iii) the appointment of a trustee or the judicial appointment of a receiver to take possession for substantially all of a Party's assets, where possession is no trestored to such Party within ninety (90) days; or (iv) the attachment, execution or other judicial seizure of substantially all of a Party's assets, where such seizure is not discharged within ninety (90) days; or

9.1.4 Any action by the School to remove or otherwise limit the authority or role of RSF under the School articles of incorporation or bylaws; or

9.1.5 The failure of the School to timely cay any of its obligations associated with the construction, acquisition, equipment or reprovation of any facilities whether directly financed or leased,

9.2. <u>Remedies</u>. If either Party defaults hereinder, the non-defaulting Party may, at its option (but without obligation to do so), perform such duty or obligation on the defaulting Party's behalf. The costs and expenses of any such performance shall be due and payable by the defaulting Party to the other Party immediately on invoice therefor. In the event of a Default of this Agreement by either Party (which is not timely cured), with or without further notice or demand, the non-defaulting Party party party and the party party hereing any remediate available to make available to make available. demand, the non-defaulting Party may pursue any remedy now or hereafter available to such Party under the laws or judicial decisions of the State.

ARTICLE 10 GENERAL PROVISIONS

3 10.1 <u>Governing Taxe</u>. This Agreement and any dispute arising from the performance or breach hereof or thereof shall be governed by, and construed and enforced in accordance with, the laws of the State of Louisiana, without reference to conflicts of laws.

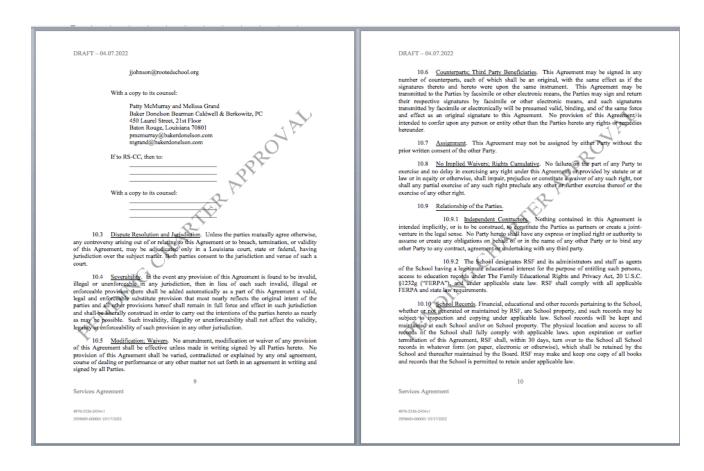
10.2 Notices. All communications and notices relating to this Agreement are to be delivered in writing, with confirmation of delivery, to the following address or another address as either Party may designate from time to time.

If to RSF, then to:

Jonathan Johnson Rooted School Foundation 4238 St. Charles Avenue New Orleans, LA 70115

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10.10.1 Student Data Privacy; Personally Identifiable Information.

 RSF shall not allow access to, release, or allow the release of dent information to any person or entity except as specified in this agreement, or as required by law.

b. RSF agrees not to sell, transfer, or process any student information for use in commercial advertising, marketing, or any other commercial purpose, unless otherwise permitted by this agreement, or by federal, state, or local law.

c. RSF agrees to create and maintain access and access authentication policies for its computer system(s) that ensure only authorized individuals have access to student information.

d. Authorized individuals include these authorized by the School and employees or agents of RSF who require access to fulfill the intent of this agreement.

e. RSF agrees to comply with all gederal, state, and local laws and regulations related to privacy compliance standards.

f. RSF agrees to provide the results of privacy and security audits on its computer systems that may be required by the School.

g. RSF agrees to put in place safeguards on its computer systems against the breach of student information-privacy. In the event of a breach of the privacy of student information, RSF agrees to immediately alert the School and to work with the School to remediate said breach.

h. RSF agrees to retain and store student information as required by this agreement with the Schoul and to delete all student information from its computer systems upon termination of this agreement. All information removed from RSF's servers upon termination of this agreement will be returned to the School.

10.11 <u>Entire Agreement</u>. This Agreement embodies the entire understanding between the Parties with respect to the Services and supersedes all previous communications, representations or understandings with respect thereto, either oral or written.

10:12 <u>Authority</u>. To the extent that this Agreement is executed by a Party or Parties on behalf of an individual, corporation, governmental entity, trust, estate or other legal entity, such party or parties executing this Agreement represent that they have authority to act on behalf of party or parties executing this agreement represent that they have authority to act on behalf of the entities or individuals for which they purport to act and to bind those entities or individuals to the terms and conditions of this Agreement. Furthermore, as each Party is a legal entity, each Party acknowledges, represents, warrants and confirms that it has full and complete authorization and power to execute this Agreement in the capacity herein stated, and this Agreement is a valid,

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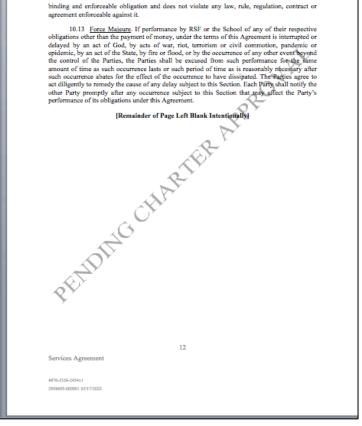
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DRAFT - 04.07.2022

binding and enforceable obligation and does not violate any law, rule, regulation, contract or agreement enforceable against it.

10.13 Force Maieure. If performance by RSF or the School of any of their respective obligations other than the payment of money, under the terms of this Agreement is interrupted or delayed by an act of God, by acts of war, riot, terrorism or civil commotion, pandemic or epidemic, by an act of the State, by fire or flood, or by the occurrence of any other event beyond the control of the Parties, the Parties shall be excused from such performance for the same amount of time as such occurrence lasts or such period of time as is reasonably necessary after andoin to time as such occurrence and to such period to time as a streadmart becompy later such occurrence abates for the effect of the occurrence to have disigned. The Parties agree to act diligently to remedy the cause of any delay subject to this Section. Each Party shall notify the other Party promptly after any occurrence subject to this Section that may affect the Party's performance of its obligations under this Agreement.



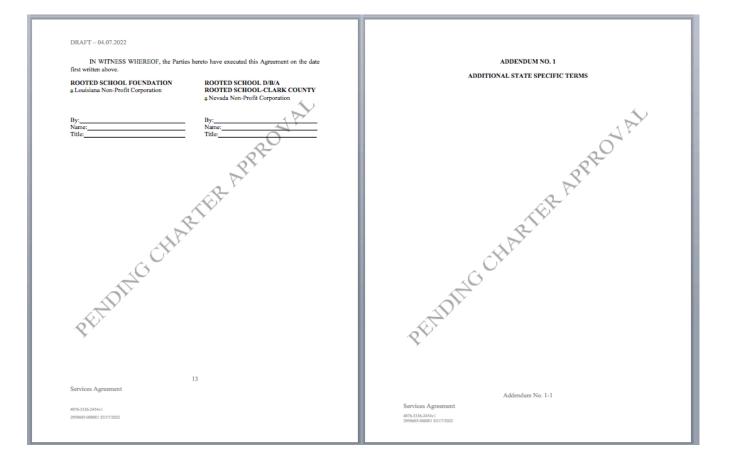


EXHIBIT A SERVICES

The following objectives and Services will be provided by RSF to RS-CC under the Services Agreement

A. Provide the Services below with the following objectives:

- RS-CC's Board successfully meets its 20XX-20XX school year goals RS-CC's Executive Director successfully meets their 20XX 20XX school
- year goals RS-CC successfully adheres to the Rooted School motel articulated in the c. charter contract
- Bi-weekly 30 minute check-in meeting with RS-CC Board Chair or designee В.
- Weekly 60 minute check-in with RS-CC Executive Director C.
- D. Attend monthly RS-CC Board meeting (virtually or in-person at RSF's option)
- Assist with Board meeting and agenda preparation and other aspects of Board meeting design, including posting Board meeting notice, and meeting minutes E.
- F. Manage Board on Track or similar platform
- G. Strategize with RS-CC Board members regarding agenda items
- H. Plan and coordinate annual Board retreat and plan professional development/strategic planning opportunities offered at retreat including:
 - a. Shared training with a third party vendor specializing in board governance and board development
 b. Board president training and consulting Regional board compliance training and professional development Professional development and training on applicable state public records and open meetings act requirements
 e. Professional development and training in Roberts Rules of Order as they pertain to public school meetings

 - Provide ongoing fundraising assistance and grant writing services including:
 - 1. Charter School Growth Fund relationship management
 - RSF will use best efforts to assist with securing lending partner(s) for facility, but 2 does not guarantee fundraising efforts will be successful

Exhibit A-1

Services Agreement 4876-3336-2454v1 2958685-000001 03/17/2022

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- Grant consulting and RFP search services 3.
- Grant writing assistance, which includes but is not restricted to ongoing engagement with Ruth Richerson Consulting 4.

Costs and expenses for (1) services provided by outside fundraisers, (ii) fundraising costs including but not limited to the costs of printing brochures, hosting events, and travel, are not included in RSF's Fee. 1 J

- J. Authorizer relationship management
 - Assist RS-CC with meeting compliance expectations of the authorizer. RS-CC is ultimately responsible for maintaining full compliance with its charter authorizer. i.

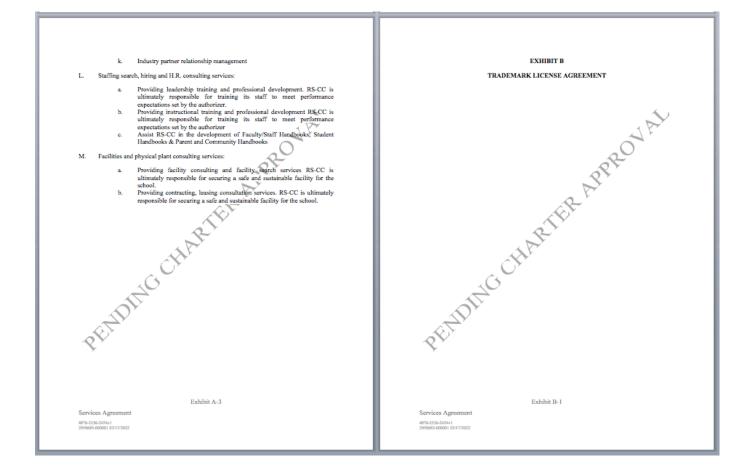
5

- K. Assist with recruiting and developing school leadership and faculty by:
 - Providing leadership training and professional development. RS-CC is a.
 - Ъ.
 - с.
 - Providing leadership training and professional development. RS-CC is ultimately responsible for training its staff to meet performance expectations set by the authorizer and school Board of Directors. Providing instructional training and professional development RS-CC is ultimately responsible for training its staff to meet performance expectations set by the authorizer and school Board of Directors. Providing the opportangity for shared staff/faculty training with other regions at RSF-sponsored retreats. Providing professional development on distance learning platforms and SIS platforms RS-CC is ultimately responsible for training its staff to meet performance expectations set by the authorizer and school Board of d.
 - Sis plantomic reactions is unimately responsible for training its start to meet performance expectations set by the authorizer and school Board of Directors. Providing experimentary and all state approved industry-based credentials (REW) RS-CC is ultimately responsible for creating and executing a curriculum that is aligned to the approved school charter submitted by Boards & School Evenduine ~
 - Rooted School Foundation. Coaching and consulting around local CTE requirements and credentialing RS-CC is ultimately responsible for creating and executing a curriculum that is aligned to the approved school charter submitted by Rooted School Foundation
 - Coaching and consultation around fiscal planning and budget development. RS-CC is ultimately responsible for the budget it develops and approves.
 - and approves. Coaching, consultation, and on the ground support to reach recruitment targets. RS-CC is ultimately responsible for meeting its enrollment goals. Identifying Industry Based Credentials that are in demand by highh. i.
 - growth/high-wage employers Managing the Industry Advisory Council (IAC) Exhibit A-2

Services Agreement 4876-3336-2454v1 2958685-000001 03/17/2022

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CMO EVALUATION TOOL



Please take a moment to give us your honest feedback to the following questions. Your responses will help us to refine our academic program and enhance your experience working with Rooted School Foundation.



stakeholders				
Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
0	0	0	0	0
5. Organizational goa charter agreement	ls are clearly ali	igned to the school'	s mission and vis	ion and to the
Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
0	0	0	0	0
6. Organizational and Poundation	school goals ar	e clearly articulated	d and supported b	y Rooted School
Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
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ollowing areas:				
following areas: 7. Rooted School Fou	ndation has mad	de a clear commitm		
Please rate your exp following areas: 7. Rooted School Fou approaches to teachin Strongly Agree 8. Rooted School Fou families have buy-in t Strongly Agree	ndation has mad ng and learning. Agree Ondation has prov	de a clear commitm Neutral vided the needed su	Disagree	Strongly Disagree
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Please rate your ex following areas:	xperience with I	Rooted School Fo	undation's servi	ces in the					
10. Rooted School Foundation has provided the needed fiscal support and professional									
development opportunities to ensure that the school has a 1:1 computer ratio									
Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree					
0	0	0	0	0					
11. Rooted School P	oundation has pr	ovided a clear IT pr	athway for the eas	ming of IBCs and					
internships with des	ignated industry	partners							
Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree					
0	0	0	0	0					
12. Rooted School F	oundation has pro	ovided consultation	and institutional	knowledge					
regarding the select									
Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree					
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15. Rooted School Foundation has provided clear guidance on student recruitment and									
enrollment strategies that are aligned to the mission and vision of the foundation									
Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree					
0	0	0	0	0					
 Rooted School Fo following programs: 	undation has pro	ovided clear guidan	ce, direction and	support for the					
a) Special Education b) English Language c) 504 Students d) MTSS (Multi-Tiere	d System of Sup	iports)							
 e) Restorative Practic 	ces								
Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree					
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Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
0	0	0	0	0
21. Rooted School Fo	undation has pr	ovided board traini	ng and onboardin	g congruent with
the diverse needs of	the school and t	he community	-	
Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
0	0	0	0	0
22. Rooted School Fo	undation has pr	ovided board traini	ng with regard to	board policies,
bylaws and meeting	-			-
	Agree	Neutral	Disagree	Strongly Disagree
Strongly Agree				
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	e provide pertinent feedback on each of the following deliverables from Exhibit the RSF Agreement.
26	How Effective were meetings with the RS-CC Board Chairperson?
- (Extremely effective
- (Effective
- (Somewhat Effective
- (Not so effective
(Not at all effective
27	How effective were meetings with the School Leader/Executive Director?
- (Extremely effective
- (Very effective
- (Somewhat effective
- (Not so effective
Ç	Not at all effective
28	How effective was RSP's assistance in preparing board meeting agendas and minutes?
(Extremely effective
- (Very effective
- (Somewhat effective
- (Not so effective
0	Not at all effective
29	How effective was RSF's management of the Board on Track platform?
(Extremely effective
- (Very effective
	Somewhat effective
(Not so effective
(Not at all effective

	How effective was RSF's support in assisting with the setting of the agenda and pletion of the minutes?
\cap	Extremely effective
ŏ	Very effective
ŏ	Somewhat effective
õ	Not so effective
0	Not at all effective
31.1	How effective was RSF's support in developing and designing the annual board retreat?
0	Extremsly effective
0	Very effective
0	Somewhat effective
0	Not so effective
0	Not at all effective
32.1	How effective was RSF's support in the annual fundraising and grant writing campaign?
0	Extremsly effective
0	Very effective
0	Somewhat effective
0	Not so effective
0	Not at all effective
	How effective was RSF's compliance support to meet all SPCSA regulations and elines?
0	Extremely effective
0	Very effective
0	Somewhat effective
0	Not so effective
0	Not at all effective
34.1	How effective was RSF's support in recruiting and training school leadership?
0	Extremely effective
0	Very effective
0	Somewhat effective
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0	Not at all effective

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	Rooted School Foundation to improve service outcomes. an you provide some feedback on how <i>Rooted School Foundation</i> has currently ared on the service agreement? What suggestions/recommendations would you have
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forward?	Rooted School Foundation to improve service outcomes. an you provide some feedback on how Rooted School Foundation has currently ared on the service agreement? What suggestions/recommendations would you have ag forward?
	Rooted School Foundation to improve service outcomes. an you provide some feedback on how Rooted School Foundation has currently and on the service agreement? What suggestions/recommendations would you have ag forward? an you provide some feedback on how Rooted School Foundation can make the service ment more clear and/or explicit? //hat Rooted School Foundation supports did you find most helpful to you in your role? h were the least helpful? What suggestions/recommendations would you have moving

40. Can you provide some feedback on how *Rooted School Foundation* delivered on the development/growth of the school leader(s)? What suggestions/recommendations would you have moving forward?

41. Can you provide some feedback on how *Rooted School Foundation* delivered on the development/growth of the local school board and its individual members? What suggestions/recommendations would you have moving forward?

Attachment 23 Academic Performance Reports

ROOTED INDIANAPOLIS - PSAT

Sum	Summary Roster (Aug 2020 - Jul 2021)										
PSAT-rela	PSAT-related Score Summary										
PSAT 8/9 Co	ntract 2021										
Grade	Total Test Takers	Mean Total Score	Mean ERW Score	Mean Math Score	% Met Both Benchmarks	% Met ERW Benchmark	% Met Math Benchmark				
9th grade	41	798	400	398	24%	46%	29%				
PSAT 8/9 Fal	PSAT 8/9 Fail 2020										
Grade	Total Test Takers	Mean Total Score	Mean ERW Score	Mean Math Score	% Met Both Benchmarks	% Met ERW Benchmark	% Met Math Benchmark				
9th grade	44	760	375	385	16%	30%	18%				

ROOTED NEW ORLEANS - 2018 ALGEBRA I



Louisiana Believes

2017-2018 Interim Assessments School Summary Report Algebra I - Form 2



School: 198 Rooted School School System: 036 Orleans Parish Report Date: 01/04/2018 Number of Tests Reported: 34/38

Average Percent of Points Earned: School, School System, and State Algebra I Subclaim Group 0% 20% 40% 60% 80% 100% School Major Content School System State School Additional & Supporting Content School System State School Expressing Mathematical School System Reasoning State School Modeling & Application School System State



2017-2018 Interim Assessments School Summary Report Algebra I - Form 2



School: 198 Rooted School School System: 036 Orleans Parish Report Date: 01/04/2018 Number of Tests Reported: 34/38

Average Percent of Points Earned: School

Subclaim		Average Percent of Points Earned	Subclaim Description
Major Content	2/18	11%	Students solve problems involving the major content for the grade level.
Additional & Supporting Content	0/6	0%	Students solve problems involving the additional and supporting content for the grade level.
Expressing Mathematical Reasoning	1/4	25%	Students express mathematical reasoning by constructing mathematical arguments and critiques.
Modeling & Application	0/3	0%	Students solve real-world problems engaging particularly in the modeling practice.

ROOTED NEW ORLEANS - 2018 ELA I

DEPARTMENT of CEDUCATION Louisiana Believes 2017-2018 Interim Assessments School Summary Report English I - Form 2							Report		
School: 198 Rooted School Report Date: 01/04/2018 School System: 036 Orleans Parish Number of Tests Reported: 2/38									
Average Percent of Points Earned: School, School System, and State									
English I Subclaim	Group	0%	20%	40%	60%	80%	100%		
Reading Literary Text	School School System								
rooming Liousy room	State								
	School								
Reading Informational Text	School System								
	State								
	School								
Reading Vocabulary	School System								
	State								
	School								
Written Expression	School System								
	State								
Writing Knowledge of Language	School								
Conventions	School System								
	State								



2017-2018 Interim Assessments School Summary Report English I - Form 2



School: 198 Rooted School School System: 036 Orleans Parish Report Date: 01/04/2018 Number of Tests Reported: 2/38

Average Percent of Points Earned: School

Claim	Subclaims	Average Points Earned	Average Percent of Points Earned	Subclaim Description
	Reading Literary Text	3/14	21%	Students read and demonstrate comprehension of grade-level fiction, drama, and poetry.
Reading	Reading Informational Text	4/18	22%	Students read and demonstrate comprehension of grade-level non-fiction, including texts about history, science, art, and music.
	Reading Vocabulary	2/8	25%	Students use context to determine the meaning of words and phrases in grade-level texts.
	Written Expression	0/12	0%	Students use details from provided texts to compose well-developed, organized, clear writing.
Writing	Writing Knowledge of Language Conventions	0/3	0%	Students use the rules of standard English (grammar, mechanics, and usage) to compose writing.

ROOTED NEW ORLEANS - 2019 ALGEBRA I



LEAP 2025 High School

Class Report

Algebra I

Spring Administration 2019

Student Name

This report provides a list of students in your class who were registered for the LEAP 2025 High School test as well as scale scores and achievement levels.

The Session Complete columns show which sessions students have completed. A "Y" displays if students entered and exited a session by confirming they were finished.

The scale score range for the LEAP 2025 High School test is 660–850. Pending (P) means a student has completed at least one session but the score is not yet reportable. A hyphen (-) means a student has not completed any test sessions or did not confirm completion upon exiting.

Section

* This test was voided due to a testing irregularity and is not reported. The student is included in the total participation count but no score is included in the school, school system, or state averages.

Teacher

#Score reflects rescore results. For non-senior students, scale scores and achievement levels will be reported late in the testing window

Course

Algebra I Algebra I Algebra I Algebra Algebra Algebra I

Agebra Agebra Algebra I

Algebra | Algebra | Algebra I Algebra | Algebra | Algebra I Algebra | Algebra | Ngebra Algebra I Algebra I Algebra I Algebra Algebra Algebra I Algebra | Algebra | Algebra I Algebra I

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Algebra I Algebra I Algebra I 2 Algebra | Algebra | 4 5 6 7 Algebra I Algebra I Algebra I 7 8 9 10 11 12 13 14 15 Algebra I Algebra I Algebra I Algebra I Aigebra I Aigebra I Algebra I 16 Agebra I Agebra I 18 19 Algebra I Algebra I Algebra I Algebra I 20

Adr

Achievement Level Scale Score Ranges Advanced Mactery Basio Approaching Basic Uncatisfactory 805_850 750_804 725-749 700-724 860_899

School System: R38 Orleans Parish

Report Date: 07/23/2021

School: 198 Rooted School

dministrative Error	LASID	Date of Birth	Grade	Session 1a Complete	Session 1b Complete	Session 2 Complete	Session 3 Complete	Retector	Soale Soore	Achievement Level
			9	Y	Y	Y	Y	N	734	Basic
			9	Y	Y	Y	Y	N	774	Mastery
			9	Y	Y	Y	Y	N	784	Mastery
			9	Y	Y	Y	Y	N	692	Unsatisfactory
			9	Y	Y	Y	Y	N	725	Basic
			9	Y	Y	Y	Y	N	728	Basic
			9	Y	Y	Y	Y	N	766	Mastery
			9	Y	Y	Ŷ	Y	N	708	Approaching Basic
			9	Y	Y	Y	Y	N	697	Unsatisfactory
			9	Y	Y	Y	Y	N	708	Approaching Basic
			9	Y	Ŷ	Ŷ	Y	N	692	Unsatisfactory
			9	Y	Y	Y	Y	N	759	Mastery
			9	Y	Y	Y	Y	N	703	Approaching Basic
			9	Y	Y	Ŷ	Y	N	704	Approaching Basic
			9	Y	Y	Y	Y	N	739	Basic
			9	Y	Y	Y	Y	N	708	Approaching Basic
			9	Ţ	T V	T	Y	N	697	Unsatisfactory
			9	Y	Y	Y	Y	N	691	Unsatisfactory
			10	¥	Ŷ	¥.	Y	N	768	Mastery
			9	Y	Y	Y	Y	N	723	Approaching Basic
			9					N		Unsatisfactory
			9	¥	Y	¥	Ŷ	NN	742	Basic
			9	Ý	Y	Y	Ý	N	714	Approaching Basic
			9	Y	Y	Y	Y	N	699	Approaching Basic Unsatisfactory
			9	÷.	Ý	÷.	Ý	Ň	780	Mastery
			9	Ý	Ý	Ý	Ý	N	708	Approaching Basic
			9	Ý	Ý	Y	Ý	N	699	Unsatisfactory
			9	Ý	Ý	Ý	Ý	Ň	650	Unsatisfactory
			9	Ý	Ý	Ý	Ý	Ň	761	Mastery
			9	Ý	Ý	Ý	Ý	N	734	Basic
			9	Ý	Ý		Ý	Ň	730	Basic
			9	Ý	Ŷ	Y	Ý	N	742	Basic
			9	Ý	Ý	Ý	Ý	Ň	804	Mastery
			é	Ý	Ý	Ý	Ý	Ň	727	Basic
			9	Ý	Ý	Ý	Ý	Ÿ	703	Approaching Basic
			9	Ý	Ý	Ý	Ý	Ň	668	Unsatisfactory
			- 9	Ý	Ý	Ý	Ý	Ň	739	Basic
			9	Ŷ	Ŷ	Ŷ	Ŷ	N	766	Mastery
			9	Ŷ	Ŷ	Ŷ	Ŷ	N	712	Approaching Basic
			9	Ý	Ý	Ý	Ý	N	691	Unsatisfactory
			9	Y	Y	Y	Y	N	703	Approaching Basic
			9	Y	Y	Y	Y	N	735	Basic
			9	Ý	Ý	Ý	Ý	Ň	759	Mastery
			9	Y	Y	Y	Y	N	708	Approaching Basic
			9	Y	Ŷ	Ŷ	Ŷ	N	692	Unsatisfactory
			9	Ŷ	Ŷ	Ŷ	Ŷ	N	725	Basic
			10	Y	Y	Y	Y	N	719	Approaching Basic
			10	Y	Y	Y	Y	N	732	Basic
			10	Ŷ	Ŷ	Ŷ	Ý	N	735	Basic
			10	Y	Y	Y	Y	N	685	Unsatisfactory
			10	Y	Y	Y	Y	N	723	Approaching Basic
			100						- 44	and the second second

Page 1 of 1

This is a secure document. The information should not be publicly released.

ROOTED NEW ORLEANS - 2019 GEOMETRY

	LEAP 2026 High School Class Report Geometry Spring Administration 2019				School System: R36 Orleans Parish School: 198 Rooted School Report Date: 07/23/2021								
a report provides a list of students in your class who were registered for Session Complete columns show which sessions students have comp								<u>Árbia</u>	wement I even	Scale Score R	langes		
red. scale accre range for the LEAP 2025 High School test is 650–650. P spofiable. A hyphen (-) means a student has not completed any test			but the accre is not		Advanc	ced	Mas	stery		asic		ing Basic	Unsatisfactory
is a secure document. The information should not be publicly release Is test was voided due to a testing imegularity and is not recorded. The					783-8	50	750	-782	725	-749	700	-724	650-699
ton-senior students, scale acores and achievement levels will be repo	ded late in the testion window												
Course Teacher	Section	Student Name	Administrative Error	LASID	Date of Birth	Grade	Session 1a Complete	Session 1b Complete	Session 2 Complete	Session 3 Complete	Retester	Scale Score	Achievement Level
				LASID		Grade					Releater	Scale Score	Achievement Level Basic
Course Teacher Geometry Geometry				LASID		10	Complete	Complete	Complete	Complete		731 719	Basic Approaching Basic
Course Teacher Geometry Geometry				LASID		10 10 10	Complete Y Y	Complete Y Y Y	Complete Y Y	Complete Y Y Y	N	731 719 758	Basic Approaching Basic Mastery
Course Teacher Georadry Georadry Georadry				LASID		10 10 10	Complete	Complete	Complete	Complete Y	N N N	731 719 758 719	Basic Approaching Basic Mastery Approaching Basic
Course Teacher Geometry Geometry Geometry Geometry				LASID		10 10 10 10	Complete Y Y	Complete Y Y Y	Complete Y Y Y Y	Complete Y Y Y	N N N N	731 719 758 719 752	Basic Approaching Basic Mastery Approaching Basic Mastery
Course Teacher Geornetry Geornetry Geornetry				LASID		10 10 10	Complete Y Y	Complete Y Y Y	Complete Y Y	Complete Y Y Y Y Y	N N N	731 719 758 719	Basic Approaching Basic Mastery Approaching Basic
Course Teacher Geornetry Geornetry Geornetry Geornetry Geornetry Geornetry Geornetry				LASID		10 10 10 10 10 10	Complete Y Y	Complete Y Y Y	Complete Y Y Y Y	Complete Y Y Y Y Y	N N N N	731 719 758 719 752 751 725 758	Basic Approaching Basic Mantary Approaching Basic Mantary Mantary Basic Mantary
Course Teacher Geometry Geometry Geometry Geometry Geometry Geometry Geometry Geometry				LASID		10 10 10 10 10 10 10	Complete Y Y	Complete Y Y Y	Complete Y Y Y Y	Complete Y Y Y Y Y	N N N N N N	731 719 758 719 752 751 752 755 758 758 758	Basic Approaching Basic Meetery Approaching Basic Meetery Basic Meetery Basic
Course Teacher Geornetry Geornetry Geornetry Geornetry Geornetry Geornetry Geornetry				LASID		10 10 10 10 10 10	Complete Y Y	Complete Y Y Y	Complete Y Y Y Y	Complete Y Y Y Y Y	N N N N N	731 719 758 719 752 751 725 758	Basic Approaching Basic Mantary Approaching Basic Mantary Mantary Basic Mantary

ROOTED NEW ORLEANS - 2019 ELA I

DEPARTMENT OF EDUCATION Louisiana Believes		LAP 2025 High School Class Report English I				School	: R38 Orleans : 188 Rooted : : 07/23/2021					Page 1 of 1
his report provides a list of students in your class who were registered	for the LEAP 2025 High Schoo	i test as well as scale scores and ach	ievement levels.									
he Session Complete columns show which sessions students have or	mpieted. A"Y" displays if stud	ents entered and exited a session by	confirming they were				Achievene	nt i avai Soala	e Soore Range	NE.		
nished. The scale score range for the LEAP 2025 High School test is 650–850.	Pending (P) means a student	has completed at least one session b	ut the score is not				Autorette	In Lover over	e coole nang	~		
et reportable. A hyphen (-) means a student has not completed any te	st sessions or did not confirm o	ompletion upon exiting.		Advanced	Mact	му	Ba	scio	Approach	ing Basio	Uni	satisfactory
his is a secure document. The information should not be publicly relea	sed.			791-860	760-3	190	726	-749	700-	-724		860-899
This test was voided due to a testing irregularity and is not reported. I included in the school, school system, or state averages. Score reflects reacore results. or non-senior students, scale scores and achievement levels will be re	he student is included in the to											
eq.# Course Teacher	Section	Student Name	Administrative Error	LASID	Date of Birth	Grade	Session 1 Complete	Session 2 Complete	Session 3 Complete	Retester	Scale Score	Achievement Level
English I English I						9	Y	¥	Y	N	722	Approaching Basic
English I English I						9	Y.	Y	Ý	N	732	Approaching Basic
English						9	¥.	¥.	¥.	N	748	Basic Mastery
English I English I						9	Ý	Ý	Ý	N	686	Unsatisfactory
English I						9	Y	Y	Y	N	715	Approaching Basic
English I English I						9	¥.	¥.	¥.	N	715	Approaching Basic Approaching Basic
English I English I						9	Ý	Ý	Ý	Ň	738	Basic
English I						9	Y	Y	Y	N	669	Unsatisfactory
English I English I						ő	Ý	Y Y	Ý	Ň	750	Approaching Basic Mestery
English I						9	Ý	Ý	Ý	N	700	Approaching Basic
English I English I						9	¥.	X	¥	N	762	Mestery Mestery
English I						9	Ý	Ý	Ý	N	703	Approaching Basic
English I						9	¥.	¥.	¥.	N	761	Mestery
English I English I						9	- V	- V	Ý	N	725	Basic
English I						9	Y	Y	Y	N	748	Basic
English I English I						9	¥.	¥.	¥	N	675 710	Unsatisfactory
English I						9	÷.	÷.	Ť.	N	738	Approaching Basic Basic
English I						9	Ŷ	Ŷ	Ý	N	775	Mastery
English I English I						9	- ÷	<u> </u>	Y	N	700	Approaching Besic Approaching Besic
English I						9	Ý	Ý	Ý	N	743	Besic
English I						9	Y	Y	Y	N	728	Basic
English						9	N N	Y I	Ý	N	711	Approaching Basic
English I						9	Ý	Ý	Ý	N	761	Mestery
English I English I						9	Y	Y	Y	N	674	Unsatisfactory Mestery
English I						9	Y	Y	Y	N	780	Mestery
English I English I						9	Y	¥.	Y	N	704	Approaching Basic
English I						9	Ý	Ý	Ý	N	769	Approaching Basic Mestery
English I						9	Ý	Ŷ	Ý	N	743	Basic
English I English I						9	Y Y	Y Y	Y	N	818	Advanced Mastery
English I						9	Ý	Ý	Ý	N	739	Basic
Endish						9	Y	Y	Y	N	700	Approaching Basic Mestery
English I English I						9	Y I	Y I	Ý	N	7/6	Mastery
English I						9	Ý	Ý	Ý	Ň	731	Basic
English I English I						9	¥.	Y N	¥	N	723 P	Approaching Basic
English I						9	Y Y	N N	Ý	N	824	Advanced
English I						9	Ý	Ý	Ý	N	770	Mestery
						10	V V	N N	¥.	N	753	Mastery Unsatisfactory
						10	Y	Ý	Ý	Ŷ	743	Basic
						10	Y	Y	Y	N	750	Mestery
						10	¥.	¥.	¥.	N	768	Mestery Mestery
						10	Ý	Ý	Ý	Ŷ	704	Approaching Basic

ROOTED NEW ORLEANS - 2019 ELA II

													Page 1 of
DEPARTM	NT of	L	EAP 2025 High School										
Louisiana Be			Class Report					R38 Orleans	Bardah				
			English II			sono		188 Rooted 8					
		Spr	ing Administration 2019			R	eport Date:	07/23/2021					
This report provides a list of stu	dents in your class who were registered fo	or the LEAP 2025 High School	test as well as scale scores and ad	hievement levels.									
The Session Complete column Inished	show which sessions students have com	pieted. A"Y" displays if stude	nts entered and exited a session by	confirming they were				Achievemer	t Level Scale	Soore Range	6		
The scale score range for the L	EAP 2025 High School test is 650–850. F ans a student has not completed any test	Pending (P) means a student h t sessions or did not confirm co	has completed at least one session b completion upon exiting.	but the score is not	Advanced	Macte	ry .		6io	Approach		Uns	atistactory
This is a secure document The	information should not be publicly release	-1			794-850	760-71	13	726-	-749	700-	724		860-699
* This test was voided due to a	testing irregularity and is not reported. The		al perticipation count but no score is	, '									
included in the school, school # Score reflects rescore results													
eq.# Course	Teacher	orted late in the testing window Section	student Name	Administrative Error	LASID	Date of Birth	Grade	Session 1 Complete	Session 2 Complete	Session 3 Complete	Retester	Scale Score	Achievement Level
1 English II							10	Y	¥	Y	N	722	Approaching Basic
							44			14		10.4	Manda and
							10	Ŷ	Ŷ	Ŷ	N	761 747	Mestery Basic
3 English II 4 English I								Ý Y Y	Y Y Y	Y	NNNN	761 747 745 770	Mastery Basic Basic Mastery
3 English I 4 English I 5 English I 6 English I							10 10 10 10	Y Y Y Y	****	Ý	N N N	747 745 770 683	Mestery Basic Basic Mastery Unsatisfactory
3 English I 4 English I 5 English I 6 English I 7 English I 8 English I 8 English I							10 10 10 10 10	Y	~ ~ ~ ~ ~	Ý Y Y Y	N N N N	747 745 770 683 675 747	Mastery Besic Besic Mastery Unsatisfactory Unsatisfactory Besic
3 English II 4 English II 5 English II 8 English II 8 English II 9 English II 9 English II							10 10 10 10 10 10	Y Y Y Y Y Y	~~~~~~	YYYYY	N N N N	747 745 770 683 675 747 769	Mastery Basic Basic Mastery Unsatisfectory Unsatisfectory Basic Mastery
3 English II 4 English II 5 English II 8 English II 7 English II 8 English II 9 English II 10 English II 11 English II							10 10 10 10 10 10 10 10	YYYYYYYYYY	~~~~~~	Ý Y Y Y	N N N N N N	747 745 770 683 675 747 769 675 730	Mestery Besic Besic Mestery Unsatisfactory Besic Mestery Unsatisfactory Besic
3 English II 4 English II 5 English II 8 English II 8 English II 9 English II 0 English II 10 English II 11 English II 22 English II							10 10 10 10 10 10 10 10 10 10 10 10 10	**************************************	~~~~~~~~	YYYYY	N N N N N N	747 745 770 883 875 747 789 875 739 739 774	Mestery Besic Besic Mastery Unsadiafactory Besic Mastery Unsadiafactory Besic Mastery Besic
S English II 4 English II 5 English II 6 English II 7 English II 9 English II 10 English II 11 English II 12 English II 13 English II 14 English II							10 10 10 10 10 10 10 10 10 10 10 10 10 1	* * * * *	~~~~~	Y Y Y Y Y Y	N N N N N N N N N N N N N N N N N N N	747 745 770 883 875 747 769 875 739 875 739 774 750 750 722	Mastery Banic Banic Mastery Unsatisfactory Banic Mastery Banic Mastery Mastery Accreaction Banic
S English II 4 English II 5 English II 6 English II 7 English II 8 English II 9 English II 9 English II 10 English II 11 English II 12 English II 13 English II 14 English II 15 English II							10 10 10 10 10 10 10 10 10 10 10 10 10 1	****	****	Y Y Y Y Y Y Y Y Y Y Y Y Y Y Y Y Y Y Y	N N N N N N N N N N N N N N N N N N N	747 745 770 683 875 747 769 675 739 774 750 774 750 722 700	Mestary Baelo Baelo Mastery Unaddifectory Baelo Mestary Daslo Mastery Mastery Accroaching Baelo
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ROOTED NEW ORLEANS - 2019 US HISTORY I

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ROOTED NEW ORLEANS – 2019 SCHOOL PERFORMANCE SCORE

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2010-2019 LETTER GRADE			65		
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esignated by its district. OW IS THIS SCHOOL PERFORMING ON PERFORMANCE SC STUDENT PERFORMANCE	CORE METRICS	-	TPROGRES	-	
Measures how well students are mastering key skills and content for their grade, in addition to how well the school is preparing students		well students	are progressi	ng towards ma: e next level of s	
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Attachment 24 990's & Audits

Caution: Forms printed from within Adobe Acrobat products may not meet IRS or state taxing agency specifications. When using Acrobat 0 x products and later products, select "None" in the "Page Scaling" selection box in the Adobe "Print" dialog.

CLIENT'S COPY

Cliftonlarsonallen, LLP 2210 E. Route 66 Glendora, CA 91740 (626) 857-7300

Rooted School 4238 St. Charles Avenue New Orleans, LA 70115

Rooted School:

Enclosed is the organization's 2017 Exempt Organization return.

Specific filing instructions are as follows.

FORM 990 RETURN:

This return has qualified for electronic filing. After you have reviewed the return for completeness and accuracy, please sign, date and return Porm 8879-E0 to our office. We will transmit the return electronically to the IRS and no further action is required. Return Form 8879-E0 to us by May 15, 2019.

A copy of the return is enclosed for your files. We suggest that you retain this copy indefinitely.

Very truly yours,

Wade Mcmullen

0070 50	IRS e-file Signature Authorization	L	OME No. 1545-1878
ram 8879-EO	for an Exempt Organization		0047
	For calendar year 2017, or flacal year beginning JUL 1 ,2017, and ending JUN 30	,2018	2017
Department of the Treasury	Do not send to the IR8. Keep for your records.		
Internal Revenue Service Name of exempt organization	Go to www.irs.qov/Form8879EO for the latest information.	- Imployer ut	enthication number
ROOTED SCHOOL	r	47-19	01769
Name and title of officer		1. 1.	01105
JONATHAN JOH	NSON		
CEO			
Part I Type of	Return and Return Information (Whole Dolars Only)		
Check the box for the ret	um for which you are using this Form 8879-EO and enter the applicable amount, if any,	from the return	. If you check the box
than 1 line in Part I. 1a Form 990 check here 2a Form 990-EZ check I 3a Form 1120-POL check 4a Form 990-PF check I 5a Form 8868 check he	here b Total revenue, if any (Form 990-EZ, line 9) skhere b Total tax (Form 1120-POL, line 22) here b Tota based on investment income (Form 990-PF, Part VI, line 5)	2b 3b 	1,504,697.
Under penalties of perjury electronic return and acc further declare that the a intermediate service pro- (a) an acknowledgement the date of any refund. If	tion and Signature Authorization of Officer y, I declare that I am an officer of the above organization and that I have examined a co- organying schedules and statements and to the best of my knowledge and belief, the mount in Part I above is the amount shown on the copy of the organization's electronic direct transmitter, or electronic return orginator (EFIO) to send the organization's return of receipt or reason for rejection of the transmission, (bit neason for any delay in pro- ppricable, I authorize the U.S. Treasury and its designated Financial Agent to initiate a	y are true, corre return. I conset to the IRS and t cessing the return an electronic turn	ect, and complete. I int to allow my to receive from the IRS um or refund, and (c) ids withdrawal (direct
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I certify that the above numeric entry is my PIN, which is my signature on the 2017 electronically field return for the organization indicated above. I contem that I am submitting this return in accordance with the requirements of Pub. 4168, Modernized «File (MeF) information for Authorized IPs) effe Froviders to Business Returns.

EBO	Must Retain This Form - See Instructions	
Do Not Submit	This Form to the IRS Unless Requested	To Do So
LHA For Paperwork Reduction Act Notice, see in	istructions.	Form 8879-EO (2017
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Revenue	9 Pr 10 In 11 0 12 To 13 G 14 B 15 S	rogram servi westment in ther revenue otal revenue rants and sit enefits paid alaries, othe	ce revenue (Part VIII, line come (Part VIII, column ((Part VIII, column (A), lin - addi lines 8 through 11 - nilar amounts paid (Part io or for members (Part I o or for members (Part I	: 1h) 2g 4), lines 3, 4, and 7d es 5, 6d, 8c, 9c, 10c, and 11e) (mast equal Park VIII, column (A), line 1 K, column (A), lines 1-3) K, column (A), line 4) e benetis (Park C, column (A), lines 5-	2)	451	,000. 0. 0. ,000. 0. 0. ,003.	Current Year 1,504,156. 0. 541. 1,504,697. 0. 0. 731,508.
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	arer F		CLIFTONLAR	SONALLEN LLP		05/04/1 Fin		P00541671 41-0746749

Par	t IV Checklist of Required Schedules (continued)			_
			Yes	No
20a	Did the organization operate one or more hospital facilities? If "Yes," complete Schedule H	20a		X
b	If "Yes" to line 20a, did the organization attach a copy of its audited financial statements to this return?	200		
21	Did the organization report more than \$5,000 of grants or other assistance to any domestic organization or			
	domestic government on Part IX, column (A), line 1? If "Yes," complete Schedule I, Parts I and II	21		X
22	Did the organization report more than \$5,000 of grants or other assistance to or for domestic individuals on	10.00		
	Part IX, column (A), line 2? If "Yes," complete Schedule I, Parts I and III	22		X
23	Did the organization answer "Yes" to Part VII, Section A, line 3, 4, or 5 about compensation of the organization's current			
	and former officers, directors, trustees, key employees, and highest compensated employees? If "Yes," complete Schedule J	28		2
343	Did the organization have a tax-exempt bond issue with an outstanding principal amount of more than \$100,000 as of the			
	last day of the year, that was issued after December 31, 2002? If "Yes," answer lines 24b through 24d and complete			
	Schedule K. If "No", go to line 25a	243		X
b	Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception?	24b		
c	Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease			
	any tax-exempt bonds?	24c		
	Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year?	24d		
53	Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations. Did the organization engage in an excess benefit			
	transaction with a disqualified person during the year? If "Yes," complete Schedule L, Part I	253		2
b	is the organization aware that it engaged in an excess benefit transaction with a disqualified person in a prior year, and			
	that the transaction has not been reported on any of the organization's prior Forms 990 or 990-E2? If "Yes," complete			
	Schedule L, Part I	25b		2
36	Did the organization report any amount on Part X, line 5, 6, or 22 for receivables from or payables to any current or			
	former officers, directors, trustees, key employees, highest compensated employees, or disqualited persons? If "Yes," complete Schedule L, Part II	26		2
27	Did the organization provide a grant or other assistance to an officer, director, trustee, key employee, substantial			
	contributor or employee thereof, a grant selection committee member, or to a 35% controlled entity or family member			
	of any of these persons? If "Yes," complete Schedule L, Part III	27		2
28	Was the organization a party to a business transaction with one of the following parties (see Schedule L, Part IV			
	instructions for applicable filing thresholds, conditions, and exceptions):			
a	A current or former officer, director, trustee, or key employee? If "Yes," complete Schedule L, Part IV	28a		3
	A family member of a current or former officer, director, trustee, or key employee? If "Yes," complete Schedule L, Part IV	28b		2
	An entity of which a current or former officer, director, trustee, or key employee (or a family member thereof) was an officer,	_		
	director, trustee, or direct or indirect owner? If "Yes," complete Schedule L, Part IV	28c		2
9	Did the organization receive more than \$25,000 in non-cash contributions? If "Yes," complete Schedule M	29		X
	Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation	_		
	contributions? If "Yes," complete Schedule M	30		2
81	Did the organization liquidate, terminate, or dissolve and cease operations?			-
	If "Yes," complete Schedule IV, Part I	31		3
32	Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? If "Yes," complete		-	-
	Schedule N, Part II	32	1.1	2
23	Did the organization own 100% of an entity disregarded as separate from the organization under Regulations			
	sections 301.7701-2 and 301.7701-3? If "Yes," complete Schedule R, Part I	33		2
34	Was the organization related to any tax-exempt or taxable entity? If "Yes," complete Schedule R, Part II, III, or IV, and Part V. line 1	34		2
157	Did the organization have a controlled entity within the meaning of section 512(b)(13)?	353		2
	If "Yes" to line 35a, did the organization receive any payment from or engage in any transaction with a controlled entity	000		-
-	within the meaning of section 512(b)(13)? If "Yes," complete Schedule R, Part V, line 2	95h		
	Wohin the meaning or section 512(0)(13)? If 'res', complete Schedule R, Part V, line 2 Section 501(c)(3) organizations. Did the organization make any transfers to an exempt non-charitable related organization?	350		-
~	section surficies organizations. Und the organization make any transfers to an exempt non-chantable related organization? If "Yes," complete Schedule R, Part V, line 2	36		2
37	Did the organization conduct more than 5% of its activities through an entity that is not a related organization			
	and that is treated as a partnership for federal income tax purposes? If "Yes," complete Schedule R, Part VI	37		2
38	Did the organization complete Schedule O and provide explanations in Schedule O for Part VI, lines 11b and 19?			
	Note. All Form 990 filers are required to complete Schedule O	1		1

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Par	t V Statements Regarding Other IRS Filings and Tax Compliance					-
	Check if Schedule O contains a response or note to any line in this Part V					
				-	Yes	N
1a	Enter the number reported in Box 3 of Form 1096. Enter -0- if not applicable	1a	9			
b	Enter the number of Forms W-2G included in line 1a. Enter -0- if not applicable	1b	0			
c	Did the organization comply with backup withholding rules for reportable payments to vendors and r	eporta	ible gaming			
	(gambling) winnings to prize winners?			10	х	
2a	Enter the number of employees reported on Form W-8, Transmittal of Wage and Tax Statements,		1993 (1993) (1993) (1997)			Γ
	fied for the calendar year ending with or within the year covered by this return	23	15			
b	If at least one is reported on line 2a, did the organization file all required federal employment tax retu	ms?		2b	х	
	Note. If the sum of lines 1a and 2a is greater than 250, you may be required to e-file (see instructions	s)				Γ
8a	Did the organization have unrelated business gross income of \$1,000 or more during the year?			3a		2
b	If "Yes," has it filed a Form 990-T for this year? If "No," to line 3b, provide an explanation in Schedule	0		3b		
43	At any time during the calendar year, did the organization have an interest in, or a signature or other	autho	nty over, a			Γ
	financial account in a foreign country (such as a bank account, securities account, or other financial	accou	nt)?	43		2
b	If "Yes," enter the name of the foreign country:					
	See instructions for filing requirements for FinCBN Form 114, Report of Foreign Bank and Financial A	ccour	ts (FBAR).			
5a	Was the organization a party to a prohibited tax shelter transaction at any time during the tax year?			5 a		2
	Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transa			5b		2
	If "Yes," to line 5a or 5b, did the organization file Form 8886-T?			50	1	F
	Does the organization have annual gross receipts that are normally greater than \$100,000, and did th					F
	any contributions that were not tax deductible as charitable contributions?	-		63		2
h	If 'Yes,' did the organization include with every solicitation an express statement that such contribut	tions o	r offis			F
-	were not tax deductible?			6b		
-	Organizations that may receive deductible contributions under section 170(c).					⊢
	Did the organization receive a payment in excess of \$75 made partly as a contribution and partly for goods and se	vices	sound at the name?	7a		2
	If "Yes," did the organization notify the donor of the value of the goods or services provided?			70		Ľ
	Did the organization sell, exchange, or otherwise dispose of tangble personal property for which it w			10	-	⊢
c		as rec	ured	-		,
	to file Form 8282?	-	1	7c	-	-
	If "Yes," indicate the number of Forms 8282 filed during the year	7d		-		,
	Did the organization receive any funds, directly or indirectly, to pay premiums on a personal benefit of			7e		3
	Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit control			71		14
_	If the organization received a contribution of qualified intellectual property, did the organization file Fi			7g	-	⊢
	If the organization received a contribution of cars, boats, airplanes, or other vehicles, did the organiz			7h	-	-
в	Sponsoring organizations maintaining donor advised funds. Did a donor advised fund maintained					
	sponsoring organization have excess business holdings at any time during the year?			8	_	-
	Sponsoring organizations maintaining donor advised funds.					
	Did the sponsoring organization make any taxable distributions under section 4966?			9a		⊢
	Did the sponsoring organization make a distribution to a donor, donor advisor, or related person?			9b	_	L
	Section 501(c)(7) organizations. Enter:					
	Initiation fees and capital contributions included on Part VIII, line 12	10a	2			
b	Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities	10b				
	Section 501(c)(12) organizations. Enter:					
2	Gross income from members or shareholders	11a				
b	Gross income from other sources (Do not net amounts due or paid to other sources against					
	amounts due or received from them.)	11b				
23	Section 4947(a)(1) non-exempt charitable trusts. Is the organization filing Form 990 in lieu of Form	1041	•	12a		
b	If "Yes," enter the amount of tax-exempt interest received or accrued during the year	12b				
	Section 501(c)(29) qualified nonprofit health insurance issuers.					
	is the organization licensed to issue qualified health plans in more than one state?			1 3a		
	Note. See the instructions for additional information the organization must report on Schedule O.					
b	Enter the amount of reserves the organization is required to maintain by the states in which the					
-	organization is licensed to issue qualified health plans	13b				
c	Enter the amount of reserves on hand	13c	2			
	Did the organization receive any payments for indoor tanning services during the tax year?			14a		2
	If "Yes," has it field a Form 720 to report these payments? If "No," provide an explanation in Schedul	-0		14b		F
	in the second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second se				990	<u> </u>

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	rt III Statement of Program Service Accomplishments
	Check if Schedule O contains a response or note to any line in this Part III
1	Briefly describe the organization's mission:
	WE EXIST TO PROVIDE OUR STUDENTS PERSONAL PATHWAYS TO FINANCIAL
	FREEDOM.
	FALLDOR.
2	Did the organization undertake any significant program services during the year which were not listed on the
-	prior Form 990 or 990-E2?
	If 'Yes,' describe these new services on Schedule O.
3	Did the organization cease conducting, or make significant changes in how it conducts, any program services?
	If "Yes," describe these changes on Schedule O.
	Describe the organization's program service accomplishments for each of its three largest program services, as measured by expenses.
-	Section 501(c)(3) and 501(c)(4) organizations are required to report the amount of grants and allocations to others, the total expenses, and
-	revenue, if any, for each program service reported. (code:) (#newss 1, 161, 056. including parts of) (#newss 541 POORDED FOR OUT DE DEPENDATION DE DEPENDATION DE DEPENDATION DE DEPENDATION DE DEPENDATION DE DEPENDATION DE DEPENDATION DE DEPENDATION DE DEPENDATION DE DEPENDATION DE DEPENDATION DE DEPENDATION DE DEPENDATION DE DEPENDATION DE DEPENDATION DE DEPENDATION DE DEPENDATION DE DEPENDATION DE DEPENDATION DE DEPENDATION DE DEPENDATION DE DEPENDATION DE DEPENDATION DE DEPENDATION DE DEPENDATION DE DEPENDATION DE DEPENDATION DE DEPENDATION DE DEPENDATION DE DEPENDATION DE DEPENDATION DE DEPENDATION DE DEPENDATION DE DEPENDATION DE DEPENDATION DE DEPENDATION DE DEPENDATION DE DEPENDATION DE DEPENDATION DE DEPENDATION DE DEPENDATION DE DEPENDATION DE DEPENDATION DE DEPENDATION DE DEPENDATION DE DEPENDATION DE DEPENDATION DE DEPENDATION DE DEPENDATION DE DEPENDATION DE DEPENDATION DE DEPENDATION DE DEPENDATION DE DEPENDATION DE DEPENDATION DE DEPENDATION DE DEPENDATION DE DEPENDATION DE DEPENDATION DE DEFENDATION DE DEPENDATION DE DE DEPENDATION DE DE DEPENDATION DE DE DE DE DE DE DE DE DE DE DE DE DE
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a	rt IV Checklist of Required Schedules			
			Yes	N
1	is the organization described in section 501(c)(3) or 4947(a)(1) (other than a private foundation)?		· · · · ·	
	If "Yes," complete Schedule A	1	х	
2	Is the organization required to complete Schedule B, Schedule of Contributors?	2	х	
8	Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for	-		\vdash
	public office? If "Yes," complete Schedule C, Part I	8		2
	Section 501(c)(3) organizations. Did the organization engage in lobbying activities, or have a section 501(h) election in effect	-	-	-
•	during the tax year? If "Yes," complete Schedule C, Part II	A		2
_	is the organization a section 501(c)(4), 501(c)(5), or 501(c)(6) organization that receives membership dues, assessments, or	4	-	-
5				
	similar amounts as defined in Revenue Procedure 98-19? If "Yes," complete Schedule C, Part III	5	_	2
6	Did the organization maintain any donor advised funds or any similar funds or accounts for which donors have the right to			١.
	provide advice on the distribution or investment of amounts in such funds or accounts? If "Yes," complete Schedule D, Part I	6		2
7	Did the organization receive or hold a conservation easement, including easements to preserve open space,			
	the environment, historic land areas, or historic structures? If "Yes," complete Schedule D, Part II	7	<u> </u>	2
8	Did the organization maintain collections of works of art, historical treasures, or other similar assets? If "Yes," complete			
	Scheolule D, Part III	8	· · · · · ·	2
9	Did the organization report an amount in Part X, line 21, for escrow or custodial account liability, serve as a custodian for			
	amounts not listed in Part X; or provide credit counseling, debt management, credit repair, or debt negotiation services?			
	If "Yes," complete Scheolule D, Part IV	9		2
0	Did the organization, directly or through a related organization, hold assets in temporanly restricted endowments, permanent			
	endowments, or quasi-endowments? If "Yes," complete Schedule D, Part V	10		2
4	If the organization's answer to any of the following questions is "Yes," then complete Schedule D, Parts VI, VII, VIII, IX, or X			-
	as applicable.			
			-	
-	Did the organization report an amount for land, buildings, and equipment in Part X, line 10? If "Yes," complete Schedule D,			Ι.
	Part VI	11a		2
b	Did the organization report an amount for investments - other securities in Part X, line 12 that is 5% or more of its total			L
	assets reported in Part X, line 16? If "Yes," complete Schedule D, Part VII	11b		2
c	Did the organization report an amount for investments - program related in Part X, line 13 that is 5% or more of its total		· · · ·	
	assets reported in Part X, line 16? If "Yes," complete Schedule D, Part VIII	11c	1.1	2
d	Did the organization report an amount for other assets in Part X, line 15 that is 5% or more of its total assets reported in		0.00	
	Part X, line 16? If "Yes," complete Schedule D, Part IX	11d	0	2
e	Did the organization report an amount for other liabilities in Part X, line 25? If "Yes," complete Schedule D, Part X	11e		2
T	Did the organization's separate or consolidated financial statements for the tax year include a footnote that addresses		1.1	
	the organization's liability for uncertain tax positions under FIN 48 (ASC 740)? If "Yes," complete Schedule D, Part X	111	х	
23	Did the organization obtain separate, independent audited financial statements for the tax year? If "Yes," complete		1.1	
	Schedule D, Parts XI and XII	12a	x	
h	Was the organization included in consolidated, independent audited financial statements for the tax year?			\vdash
	If "Yes," and if the organization answered "No" to line 12a, then completing Schedule D, Parts XI and XII is optional	12b		2
	Is the organization a school described in section 170(b)(1)(A)(I)? If "Yes," complete Schedule E	13	х	-
	Did the organization maintain an office, employees, or agents outside of the United States?	143		2
	Did the organization have aggregate revenues or expenses of more than \$10,000 from grantmaking, fundraising, business,	1463	-	-
D				
	investment, and program service activities outside the United States, or aggregate foreign investments valued at \$100,000	1000		
	or more? If "Yes," complete Schedule F, Parts I and IV	14b	-	2
5	Did the organization report on Part IX, column (A), line 3, more than \$5,000 of grants or other assistance to or for any			
	toreign organization? If "Yes," complete Schedule F, Parts II and IV	15		2
6	Did the organization report on Part IX, column (A), line 3, more than \$5,000 of aggregate grants or other assistance to			
	or for foreign individuals? If "Yes," complete Schedule F, Parts III and IV	16		2
7	Did the organization report a total of more than \$15,000 of expenses for professional fundraising services on Part IX,			
	column (A), lines 6 and 11e? If "Yes," complete Schedule G, Part I	17		2
8	Did the organization report more than \$15,000 total of fundraising event gross income and contributions on Part VIII, lines			
	1c and 8a? If "Yes," complete Schedule G, Part II	18		2
9	Did the organization report more than \$15,000 of gross income from gaming activities on Part VIII, line 9a? If "Yes,"	-	0.2	f
-	complete Schedule G, Part III	19		1
	Same and a second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second	1 12		

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Par	1990 (2017) ROOTED SCHOOL 47-1901 tVI Governance, Management, and Disclosure For each "Yes" response to lines 2 through 7b below, and for a			
	to line 8a, 8b, or 10b below, describe the circumstances, processes, or changes in Schedule O. See instructions.			
	Check if Schedule O contains a response or note to any line in this Part VI			
0				
sec	tion A. Governing Body and Management			т
		_	Yes	ł
13	Enter the number of voting members of the governing body at the end of the tax year1a 8			I
	If there are material differences in voting rights among members of the governing body, or if the governing	2		I
	body delegated broad authority to an executive committee or similar committee, explain in Schedule 0.			I
b	Enter the number of voting members included in line 1a, above, who are independent 1b 8			I
2	Did any officer, director, trustee, or key employee have a family relationship or a business relationship with any other			I
	officer, director, trustee, or key employee?	2		
3	Did the organization delegate control over management duties customarily performed by or under the direct supervision			I
	of officers, directors, or trustees, or key employees to a management company or other person?	3		
4	Did the organization make any significant changes to its governing documents since the prior Form 990 was filed?	4		1
5	Did the organization become aware during the year of a significant diversion of the organization's assets?	5		1
	Did the organization have members or stockholders?	6		1
	Did the organization have members, stockholders, or other persons who had the power to elect or appoint one or	-		1
	more members of the governing body?	7a		I
	Are any governance decisions of the organization reserved to (or subject to approval by) members, stockholders, or		-	ł
5	Are any governance decisions or the organization reserved to (or subject to approval by) members, stockholders, or persons other than the governing body?	7b		I
	Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following:	10		ł
			v	l
	The governing body?	8a	X	ļ
	Each committee with authority to act on behalf of the governing body?	8b	х	ļ
9	is there any officer, director, trustee, or key employee listed in Part VII, Section A, who cannot be reached at the			I
2 C .	organization's mailing address? If "Yes," provide the names and addresses in Schedule O	9		
Sec	tion B. Policies (This Section B requests information about policies not required by the Internal Revenue Code.)			
		(N - 8)	Yes	
10a	Did the organization have local chapters, branches, or affiliates?	10a		1
	If "Yes," did the organization have written policies and procedures governing the activities of such chapters, affiliates,			1
	and branches to ensure their operations are consistent with the organization's exempt purposes?	100		I
11a	Has the organization provided a complete copy of this Form 990 to all members of its governing body before filing the form?	11a	х	1
	Describe in Schedule O the process, if any, used by the organization to review this Form 990.			t
	Did the organization have a written conflict of interest policy? If "No," go to line 13	12a	х	1
	Were officers, directors, or trustees, and key employees required to disclose annually interests that could give rise to conflicts?	12b	X	1
_		120	-	┨
c	Did the organization regularly and consistently monitor and enforce compliance with the policy? If "Yes," describe		x	I
	in Schedule O how this was done	12c	_	
	Did the organization have a written whistleblower policy?	13	x	ł
	Did the organization have a written document retention and destruction policy?	14	-	ļ
15	Did the process for determining compensation of the following persons include a review and approval by independent			I
	persons, comparability data, and contemporaneous substantiation of the deliberation and decision?			I
а	The organization's CEO, Executive Director, or top management official	15a	х	l
b	Other officers or key employees of the organization	15b	х	1
	If "Yes" to line 15a or 15b, describe the process in Schedule O (see instructions).	2 R		Ī
16a	Did the organization invest in, contribute assets to, or participate in a joint venture or similar arrangement with a			I
	taxable entity during the year?	16a		l
P	If "Yes," did the organization follow a written policy or procedure requiring the organization to evaluate its participation			ĺ
-	In 'res,' do be organization follow a written porcy or procedure requiring the organization to evaluate its participation In joint venture arrangements under applicable federal tax law, and take steps to safeguard the organization's			l
	exempt status with respect to such anangements?	16h		ł
		100		
	tion C. Disclosure			
	List the states with which a copy of this Form 990 is required to be filed NONE		-	
18	Section 6104 requires an organization to make its Forms 1023 (or 1024 if applicable), 990, and 990-T (Section 501(c)(3)s only)	availab	ic	
	tor public inspection. Indicate how you made these available. Check all that apply.			
	Own website Another's website 🔟 Upon request Other (explain in Schedule O)			
19	Describe in Schedule O whether (and if so, how) the organization made its governing documents, conflict of interest policy, an	d finan	cial	
	statements available to the public during the tax year.			
20	State the name, address, and telephone number of the person who possesses the organization's books and records:			
200	ORGANIZATION - 504-208-6571			
20				
~	4238 ST. CHARLES AVENUE, NEW ORLEANS, LA 70115			
		Form	990	1
735:00	4238 ST. CHARLES AVENUE, NEW ORLEANS, LA 70115	Form	990	1

Section A. Officers, Directors, Trustee		-			
1a Complete this table for all persons rec	juired to be listed. Rep	port compensation for the	e calendar year ending	with or within the org	anization's tax ye
List all of the organization's current Enter -0- in columns (D), (E), and (F) if no o List all of the organization's current List the organization's five current hi able compensation (Box 5 of Form W-2 ar	compensation was pai t key employees, if an ighest compensated e	id. IV. See instructions for def employees (other than an	finition of "key employ officer, director, truste	ee." ee, or key employee) w	ho received report
reportable compensation from the organi © List all of the organization's former more than \$10,000 of reportable compen	directors or trustees	s that received, in the cap		tor or trustee of the or	ganization,
and former such persons.					ed employees;
List persons in the following order: individ and former such persons. Check this box if neither the organic (A) Name and Title					(F) Estimated amount of other

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Form 990 (2017)

213-18V1

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16210504 135992 213-11828000 2017.05050 ROOTED SCHOOL

Form 930 (2017) ROOTED SCHOOL 47–19 Part VII Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated

ROOTED SCHOOL

Check if Schedule O contains a response or note to any line in this Part VII

Employees, and Independent Contractors

(1) MATT CANDLER

(2) TRAVIS CHASE

(3) KESANA DURAND

(5) BRANDIN CAMPBELL

BOARD CHAIR

BOARD MEMBER

BOARD MEMBER

BOARD MEMBER

TREASURERER

BOARD MEMBER

PARENT LIAISON

CEO (10) ADRIEN MAUGHT

C00

730007 11.08.17

(6) TONY ZANDERS

(7) JOHN ALFORD

(8) GERRI WILLIS

(9) JONATEAN JOHNSON

SECRETARY

(4) KYLE FINKE

(A) Name and title	(B) Average hours per week	(do m bez, s affice	P	(C) osition person	than -	-	(D) Reportable compensation from	(E) Reportable compensation from related		(F) Estimat amount othe	to
	hours for related		Institution of Institute	Officer Separatelyse	High red companiated amployee	Farme	organization (W-2/1099-MISC)	organizations (W-2/1099-MISC)		from to organiza and rela	
			╏								-
аланан алан алан алан алан алан алан ал			+	1000							_
100112 and 0.000 International part of the set of th				_							
<i>6</i>			┦	-		\mid	a		+		_
			1								_
							188,917.	0		22,5	5
d Total (add lines 1b and 1c) 2 Total number of individuals (including b	but not limited to th	nose li	isted	abov	e) wł	hore	188,917.	0	-	22,5	
			-	-	-		-	mplayee on	3	Yes	1
4 For any individual listed on line 1a, is the and related organizations greater than	\$150,000? If "Yes,	con	plet	e Sch	n and eduk	d oth	er compensation from or such individual		4		1
rendered to the organization? If "Yes,"							ed organization or indiv	dual for services	5		1
1 Complete this table for your five higher		-							satio	in from	
(A))		-		_	Ι			Com	(C) pensati	
2						\downarrow					_
<						+					-
						1					-
						- 1					
2 Total number of independent contract \$100,000 of compensation from the or		vot lim	ited		se lis D	sted	above) who received m	ore than			

Program Service Contributions, Gifts, Grants Revenue and Other Similar Amounts	Otheck if Schedule O contains a response or note to an	(A) Total revenue	(B) Related or exempt function revenue	(C) Unrelated business revenue	(D) from tax u section 512 - 5
2	1 a Federated campaigns 1a				
5	b Membership dues 1b				
ŝ	c Fundraising events 1c				
5	d Related organizations 1d				
Ē	e Government grants (contributions) 1e 650,60	5.			
3	f All other contributions, gifts, grants, and				
ŧ	similar amounts not included above 17 853,55	D.			
pp	g Honcash contributions included in lines 12-11:5	-			
8		1,504,156.	-		
	Business Co	ode			
	2 3				<u> </u>
3	b	6		<u> </u>	
5	<u>5</u>	-	<u> </u>		
đ	°				+
	f All other program service revenue		<u> </u>		+
					<u> </u>
-	q Total. Add lines 2a-21 investment income (including dividends, interest, and	•			
	other similar amounts) 4 income from investment of tax-exempt bond proceeds				
	5 Royaltes				
	() Real (I) Persona				
	6 a Gross rents	-			
	b Less: rental expenses	-			
	c Rental income or (loss)	-			
	d Net rental income or (loss)				-
	7 a Gross amount from sales of () Securities (i) Other				
	assets other than inventory	-			
	b Less: cost or other basis				
	and sales expenses				
	c Gain or (loss)				
		•			
.	8 a Gross income from fundraising events (not				
2 I	including \$ of				
OTHER PRIVATING	contributions reported on line 1c). See				
5	Part IV, line 18 a				
	b Less: direct expensesb				
2	c Net income or (loss) from fundraising events	•			
	9 a Gross income from gaming activities. See			ř – 1	
	Part IV, line 19 a				
	b Less: direct expenses b				
	c Net income or (loss) from gaming activities	•			
	10 a Gross sales of inventory, less returns				
	and allowances a				
	b Less: cost of goods sold b				
		>		2 (
	Miscellaneous Revenue Business Ca				
	11 a OTHER REVENUE 90009	9 541.	541.		
	b			1	
	c	1			
	d All other revenue	1 S		5 5	
	e Total. Add lines 11a-11d	541.			
	12 Total revenue. See instructions.	1,504,697.	541.	0.	4

Sect	ion 501(c)(3) and 501(c)(4) organizations must com	plete all columns. All othe	er organizations must co	mplete column (A).	
	Check if Schedule O contains a respon	se or note to any line in t	his Part IX		
	not include amounts reported on lines 6b, 8b, 9b, and 10b of Part VIII.	(A) Total expenses	(B) Program service expenses	(C) Management and general expenses	(D) Fundraising expenses
1	Grants and other assistance to domestic organizations				
	and domestic governments. See Part IV, line 21				
2	Grants and other assistance to domestic				
	Individuals. See Part IV, line 22				
3	Grants and other assistance to foreign				
	organizations, foreign governments, and foreign				
	individuals. See Part IV, lines 15 and 16				
4	Benefits paid to or for members				
	Compensation of current officers, directors,				
-	trustees, and key employees	207,269.	165,816.	41,453.	
6	Compensation not included above, to disqualified				
	persons (as defined under section 4958(f)(1)) and				
	persons described in section 4938(c)(3)(B)				
-	Other salaries and wages	422,153.	318,303.	103,850.	
	Pension plan accruals and contributions (include	100,100.	510,5051	100,0001	
8	section 401(k) and 403(b) employer contributions)	13,313.	9,284.	4,029.	
9		43,112.	29,406.	13,706.	
10		45,661.	35,438.	10,223.	
	Payroll taxes	40,001.	55,450.	10,223.	
	Fees for services (non-employees):				
	Management	E 400		E 400	
	Legal	5,426.		5,426.	
	Accounting	13,891.		13,891.	
	Labbying				
	Professional fundraising services. See Part IV, line 17		2		
	Investment management fees				
9	Other. (If line 11g amount exceeds 10% of line 25,	Assess Assess	6	10000000000	
	column (A) amount, list line 11g expenses on Sch 0.)	102,203.	80,787.	21,416.	
12		559.		559.	
13	Office expenses	5,385.		5,385.	
14	Information technology				
15	Royattes	in a company of	Test the second		
16	Occupancy	150,290.	150,290.		
17	Travel	131,529.	110,199.	21,330.	
18	Payments of travel or entertainment expenses	and a second second	10000000000000000000000000000000000000		
	for any federal, state, or local public officials				
19	Conferences, conventions, and meetings			(S.	
20	Interest				
21	Payments to affiliates				
22	Depreciation, depietion, and amortization				
23	Insurance	9,589.		9,589.	
	Other expenses, itemize expenses not covered				
	above. (List miscellaneous expenses in line 24e. If line				
	24e amount exceeds 10% of line 25, column (A) amount, list line 24e expenses on Schedule 0.)				
2	INSTRUCTIONAL MATERIALS	235,166.	235,166.		
b					
-					
-	All other expenses	37,357.	26,367.	10,990.	
25	Total functional expenses. Add lines 1 through 24e	1,422,903.	1,161,056.	261,847.	
~	Joint costs. Complete this line only if the organization	1,100,503.	1,101,000.	201,01/.	
20					
	reported in column (B) joint costs from a combined				
	educational campaign and fundraising solicitation.				
	Check hare . If following SOF 98-2 (ASC 958-720)				Form 990 (

art	t X	Balance Sheet			
		Check if Schedule O contains a response or note to any line in this Part X			
			(A) Beginning of year		(B) End of year
Т	1	Cash - non-interest-bearing	125,232.	1	164,91
	2	Savings and temporary cash investments		2	
		Pledges and grants receivable, net		3	60,68
		Accounts receivable, net		4	
		Loans and other receivables from current and former officers, directors,			
		trustees, key employees, and highest compensated employees. Complete			
		Part II of Schedule L		5	
	6	Loans and other receivables from other disqualified persons (as defined und	ler		
		section 4958(f)(1)), persons described in section 4958(c)(3)(B), and contribut	199		
		employers and sponsoring organizations of section 501(c)(9) voluntary	-		
		employees' beneficiary organizations (see instr). Complete Part II of Sch L		6	
	7	Notes and loans receivable, net		7	
	8	Inventories for sale or use		8	
	9	Prepaid expenses and deferred charges	2,145.	9	
1 1 1 1 1 1 1		Land, buildings, and equipment: cost or other			
	-	basis. Complete Part VI of Schedule D 10a			
	b	Less: accumulated depreciation 10b	_	10c	
	11	Investments - publicly traded securities		11	
	12	Investments - other securities. See Part IV, line 11		12	
	13	Investments - program-related. See Part IV, line 11		13	
		Intangible assets		14	
		Other assets. See Part IV, line 11		15	
1	16	Total assets. Add lines 1 through 15 (must equal line 34)	127,377.	16	225,60
		Accounts payable and accrued expenses		17	25,28
		Grants payable		18	
		Deferred revenue		19	
		Tax-exempt bond labities		20	
	21	Escrow or custodial account liability. Complete Part IV of Schedule D		21	
		Loans and other payables to current and former officers, directors, trustees,			
	_	key employees, highest compensated employees, and disqualified persons.			
		Complete Part II of Schedule L		22	
	23	Secured mortgages and notes payable to unrelated third parties		23	
		Unsecured notes and loans payable to unrelated third parties		24	
		Other liabilities (including federal income tax, payables to related third			
		parties, and other liabilities not included on lines 17-24). Complete Part X of			
		Schedule D		25	
	26	Total liabilities. Add lines 17 through 25	8,848.	26	25,28
+		Organizations that follow 8FA8 117 (A8C 958), check here X an	d		
		complete lines 27 through 29, and lines 38 and 34.			
	27	Unrestricted net assets	118,529.	27	200,32
		Temporarily restricted net assets		28	
		Permanently restricted net assets		29	
		Organizations that do not follow 3FAS 117 (ASC 958), check here			
		and complete lines 30 through 34.			
	30	Capital stock or trust principal, or current funds		30	
		Paid-in or capital surplus, or land, building, or equipment fund		31	
		Retained earnings, endowment, accumulated income, or other funds		32	
		Total net assets or fund balances		33	200,32
		Total liabilities and net assets/fund balances	127.377.	34	225,60

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	t VI Deserve listing of black Associate	47-19		_	
d	t XI Reconciliation of Net Assets				-
_	Check if Schedule O contains a response or note to any line in this Part XI				
1	Total revenue (must equal Part VIII, column (A), line 12)	1	1,50	4,6	97
2	Total expenses (must equal Part IX, column (A), line 25)	2	1,42	2,9	03
3	Revenue less expenses. Subtract line 2 from line 1	3	8	1,7	94
4	Net assets or fund balances at beginning of year (must equal Part X, line 33, column (A))	4	11	8,5	29
5	Net unrealized gains (losses) on investments	5			-
6	Donated services and use of facilities	6			
7	Investment expenses	7			
8	Prior period adjustments	8			
9	Other changes in net assets or fund balances (explain in Schedule O)	9			0
0	Net assets or fund balances at end of year. Combine lines 3 through 9 (must equal Part X, line 33,				
	column (B)	10	20	0,3	23
1	Check if Schedule O contains a response or note to any line in this Part XII		-	Yes	N
	the second of the second second second second second second second second second second second second second se		- 23	Yes	
2a	Accounting method used to prepare the Form 990: Cash X Accrual Other If the organization changed its method of accounting from a prior year or checked "Other," explain in Sche Were the organization's financial statements completed or reviewed by an independent accountant? If "Yes," check a box below to indicate whether the financial statements for the year were compiled or revi separate basis, consolidated basis, or both: Separate basis Consolidated basis, or both:	ewed on a			
23	Accounting method used to prepare the Form 990: Cash X Accrual Other If the organization changed its method of accounting from a prior year or checked "Other," explain in Sche Were the organization's trianical statements completed or reviewed by an independent accountant? If "Yes," check a box below to indicate whether the financial statements for the year were compiled or reviewed by as independent accountant? If "Yes," check a box below to indicate whether the financial statements for the year were compiled or reviewed by as independent basis, or both: Separate basis Consolidated basis Both consolidated and separate basis Were the organization's financial statements audited by an independent accountant?	ewed on a		Yes	X
23	Accounting method used to prepare the Form 990: Cash X Accual Other If the organization charged its method of accounting from a prior year or checked "Other," explain in Sche Were the organization's financial statements completed or reviewed by an independent accountant? If "Yes," check a box below to indicate whether the financial statements for the year were completed or reviewed by an independent accountant? If sparate basis Consolidated basis, or both: Consolidated basis Both consolidated and separate basis Were the organization's financial statements audited by an independent accountant? If "Yes," reviewed basis, a or both: The statements audited basis Both consolidated and separate basis Were the organization's financial statements audited by an independent accountant? If "Yes," reviewed a box below to indicate whether the financial statements for the year were audited on a seg	ewed on a			
23	Accounting method used to prepare the Form 990: Cash X Accrual Other If the organization changed its method of accounting from a prior year or checked "Other," explain in Sche Were the organization's trianical statements completed or reviewed by an independent accountant? If "Yes," check a box below to indicate whether the financial statements for the year were compiled or reviewed by as independent accountant? If "Yes," check a box below to indicate whether the financial statements for the year were compiled or reviewed by as independent basis, or both: Separate basis Consolidated basis Both consolidated and separate basis Were the organization's financial statements audited by an independent accountant?	ewed on a			
b	Accounting method used to prepare the Form 990: Cash X Accual Other If the organization charged its method of accounting from a prior year or checked "Other," explain in Sche Were the organization's financial statements completed or reviewed by an independent accountant? If "Yes," check a box below to indicate whether the financial statements for the year were completed or reviewed by an independent accountant? If "Yes," check a box below to indicate whether the financial statements for the year were completed or reviewed by an independent accountant? If "Yes," check a box below to indicate whether the financial statements for the year were acuted basis. Were the organization's financial statements audited by an independent accountant? If "Yes," check a box below to indicate whether the financial statements for the year were audited on a sep consolidated basis, or both: If "Ses," check a box below to indicate whether the financial statements for the year were audited on a sep consolidated basis. Dothor indicate the financial statements are mere reported and separate basis If "Yes," check a box below to indicate whether the financial statements for the year were audited on a sep consolidated basis, or both: If "Yes," check a dor 2b, obe site origination have a committee that assumes responsibility for oversight.	ewed on a parate basis, of the audit,	20	x	
2a b	Accounting method used to prepare the Form 990: Cash X Accual Other If the organization changed its method of accounting from a prior year or checked "Other," explain in Sche Were the organization's financial statements completed or reviewed by an independent accountant? If "Yes," check a box bokow to indicate whether the financial statements for the year were completed or revi separate basis, consolidated basis, or both: Separate basis Consolidated basis Both consolidated and separate basis If "Yes," check a box bokow to indicate whether the financial statements and the year were audited on a sep convolidated basis, or both: Separate basis, or both: Separate basis Consolidated basis Both consolidated and separate basis	ewed on a parate basis, of the audit,	20		
2a b	Accounting method used to prepare the Form 990: Cash X Accual Other If the organization charged its method of accounting from a prior year or checked "Other," explain in Sche Were the organization's financial statements completed or reviewed by an independent accountant? If "Yes," check a box below to indicate whether the financial statements for the year were completed or reviewed by an independent accountant? If "Yes," check a box below to indicate whether the financial statements for the year were completed or reviewed by an independent accountant? If "Yes," check a box below to indicate whether the financial statements for the year were acuted basis. Were the organization's financial statements audited by an independent accountant? If "Yes," check a box below to indicate whether the financial statements for the year were audited on a sep consolidated basis, or both: If "Ses," check a box below to indicate whether the financial statements for the year were audited on a sep consolidated basis. Dothor indicate the financial statements are mere reported and separate basis If "Yes," check a box below to indicate whether the financial statements for the year were audited on a sep consolidated basis, or both: If "Yes," check a dor 2b, obe site origination have a committee that assumes responsibility for oversight.	ewed on a parate basis, of the audit,	20	x	
b	Accounting method used to prepare the Form 990: Cash X Accrual Other If the organization changed its method of accounting from a prior year or checked "Other," explain in Sche Were the organization's financial statements completed or reviewed by an independent accountant? If "Yes," check a box below to indicate whether the financial statements for the year were completed or reviewere by an independent accountant? If "Yes," check a box below to indicate whether the financial statements for the year were completed or reviewere by an independent accountant? Separate basis Consolidated basis Both consolidated and separate basis Were the organization's financial statements audited by an independent accountant? If "Yes," check a box below to indicate whether the financial statements for the year were audited on a sep consolidated basis, or both: Consolidated basis Both consolidated and separate basis If "Yes," to line 2a or 2b, does the organization have a committee that assumes responsibility for oversight review, or compliation of its financial statements and selection of an independent accountant?	ewed on a parate basis, of the audit, Schedule O.	20	x	
b	Accounting method used to prepare the Form 990: Cash X Accual Other If the organization charged its method of accounting from a prior year or checked "Other," explain in Sche Were the organization's financial statements completed or reviewed by an independent accountant? If "Yes," check a box below to indicate whether the financial statements for the year were completed or reviewed by an independent accountant? If "Yes," check a box below to indicate whether the financial statements for the year were completed or reviewed by an expande basis. Consolidated basis Both consolidated and separate basis Were the organization's financial statements actived by an independent accountant? If "Yes," check a box below to indicate whether the financial statements and the year were audited on a seg consolidated basis. Consolidated basis Both consolidated and separate basis If "Yes," to line 2a or 2b, does the organization have a committee that accountant? If "Yes," to line 2a or 2b, does the organization have a domenter that accountant? If were, or complation of its financial statements and selection of an independent accountant? If the organization thange a there its oversight process or selection process during the tax year, explain in the organization have a committee that accountant?	ewed on a parate basis, of the audit, Schedule O.	20	x	
c Ba	Accounting method used to prepare the Form 990: Cash X Accual Other If the organization charged its method of accounting from a prior year or checked "Other," explain in Sche Were the organization's financial statements completed or reviewed by an independent accountant? If "Yes," check a box below to indicate whether the financial statements for the year were completed or reviewed by an independent accountant? If "Yes," check a box below to indicate whether the financial statements for the year were completed or reviewed by an independent accountant? Separate basis Consolidated basis, or both: Separate basis Consolidated basis Both consolidated and separate basis Were the organization's financial statements audited by an independent accountant? If "Yes," check a box below to indicate whether the financial statements for the year were audited on a sep consolidated basis, or both: Separate basis Consolidated basis Both consolidated and separate basis If "Yes," check a box below to indicate whether the financial statements for the year were audited on a sep consolidated basis, or both: Separate basis Consolidated basis Both consolidated and separate basis If "Yes," check a box the organization have a committee that assumes responsibility for oversight review, or compliation of its financial statements and selection of an independent accountant? If the organization changed either its oversight process or selection process dumg the tax year, explain in As a result of a federal award, was the organization required to undergo an audit or audits as set forth in th	ewed on a parate basis, of the audit, Schedule O. ee Single Audit	20	x	x

504,697.	(Form 950 or 950-E2) Comp	Iblic Charity Status an Nete if the organization is a section 50 4947(a)(1) nonexempt ch Attach to Form 990 or attach to Form 990 to instruct	1(c)(3) organization aritable trust. Form 990-EZ.	or a section	Open to Public Inspection
422,903.	Name of the organization	and the second second second second second second second second second second second second second second second		Employer	identification number
81,794.	ROOTED	SCHOOL		4	7-1901769
118,529.	Part I Reason for Public Cha	arity Status (All organizations must c	complete this part.) Se	ee instructions.	
	The organization is not a private foundatio	n because it is: (For lines 1 through 12,	check only one box.)		
	1 A church, convention of church	hes, or association of churches describe	d in section 170(b)(1)(A)(i).	
0	2 X A school described in section	170(b)(1)(A)(ii). (Attach Schedule E (For	m 990 or 990-EZ).)		
	3 A hospital or a cooperative hospital	pital service organization described in s	ection 170(b)(1)(A)(i	ii).	
0.	4 A medical research organization	n operated in conjunction with a hospita	al described in sectio	n 170(b)(1)(A)(iii). Enter	the hospital's name,
	city, and state:			Altri di Sol Rep	. 10 - 101
200,323.	5 An organization operated for th	e benefit of a college or university owne	ed or operated by a g	overnmental unit descrit	bed in
_	section 170(b)(1)(A)(iv). (Com				
		ment or governmental unit described in			
Yes No		eceives a substantial part of its support	from a governmental	unit or from the general	public described in
	section 170(b)(1)(A)(vi). (Comp				
		section 170(b)(1)(A)(vi). (Complete Pa			
a X		zation described in section 170(b)(1)(A)			
	or university or a non-land-gran	t college of agriculture (see instructions)	. Enter the name, city	y, and state of the colleg	je or
	university:				
	10 An organization that normally re	eceives: (1) more than 33 1/3% of its su	pport from contributi	ons, membership fees, a	and gross receipts from
x d		functions - subject to certain exceptions			
		s taxable income (less section 511 tax) fi	rom businesses acqu	ired by the organization	after June 30, 1975.
	See section 509(a)(2). (Comple				
		operated exclusively to test for public s			
		operated exclusively for the benefit of, t	•		
x X		izations described in section 509(a)(1) o			Check the box in
		cribes the type of supporting organization			
		ation operated, supervised, or controlled			
a X) the power to regularly appoint or elect	a majority of the dire	ctors or trustees of the s	supporting
		plete Part IV, Sections A and B.			100 M
m 990 (2017)		ation supervised or controlled in connect e supporting organization vested in the s			
km 990 (2017)	-	implete Part IV, Sections A and C.	same persons that co	and or manage the sol	sporteu
		ted. A supporting organization operated	in connection with	and & motion ally interest	and with
		(see instructions). You must complete			cu wul,
		tegrated. A supporting organization ope			(n) and (n)
		ated. The organization generally must sa			
		a. You must complete Part IV, Section			
		ation received a written determination fr			
		pe III non-functionally integrated support		1 . 1 . 1	
	f Enter the number of supported orga				
	g Provide the following information ab	out the supported organization(s).			
	(I) Name of supported	(II) EIN (III) Type of organization (described on lines 1-10	NUE DE LE PRESENTE SEE	(v) Amount of monetary	(vi) Amount of other
	organization	(described on lines 1-10 above (see instructions))	Yes No	support (see instructions)	support (see instructions)
			· · · · · · · · · · · · · · · · · · ·		· · · · · · · · · · · · · · · · · · ·
			1 1 7		
		9			
	Total				2
	Total LHA For Paperwork Reduction Act Notic	ce, see the instructions for Form 990		06-17 Schedule A (Fo	m 990 or 990-EZ) 201

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	endar year (or fiscal year beginning in) 🕨	(a) 2013	(b) 2014	(c) 2015	(d) 2016	(e) 2017	(f) Total
1	Gifts, grants, contributions, and		- C	2 2020 22	0.000	A - 1991-12	A 00100
	membership fees received. (Do not						
	include any "unusual grants.")						
2	Tax revenues levied for the organ-						
	ization's benefit and either paid to						
	or expended on its behalf			·			1
3	The value of services or facilities						
	furnished by a governmental unit to						
	the organization without charge						
4	Total. Add lines 1 through 3				6		
	The portion of total contributions						<u> </u>
-	by each person (other than a						1
	governmental unit or publicly						1
	supported organization) included						1
	on line 1 that exceeds 2% of the						1
	amount shown on line 11.						1
	column (5						1
				-			t
	Public support. Subtract line 3 from line 4				1.2		
	endar year (or fiscal year beginning in)	(-) 0040	111 004 1	100.0045	140 0045	(+) 0047	AR Total
		(a) 2013	(b) 2014	(c) 2015	(d) 2016	(e) 2017	(f) Total
	Amounts from line 4						
8							
	dividends, payments received on						
	securities loans, rents, royalties,						
	and income from similar sources	_	-	-	2		2
9	Net income from unrelated business						
	activities, whether or not the						
	business is regularly carried on			2	2		12
10	Other income. Do not include gain				32		
	or loss from the sale of capital						
	assets (Explain in Part VI.)						
11	Total support. Add lines 7 through 10			1. Di		100	S
12	Gross receipts from related activities, e	tc. (see instruc	tions)	2.03.02.03.0		12	-
13	First five years. If the Form 990 is for t	he organization	's first, second, thi	rd, fourth, or fifth t	ax year as a secti	on 501(c)(3)	
1	organization, check this box and stop I	here					
Se	ction C. Computation of Public	Support P	ercentage				
14	Public support percentage for 2017 (lin	e 6, column (f)	divided by line 11,	column (1))		14	
15	Public support percentage from 2016 §	chedule A, Par	t II, line 14			15	
	33 1/3% support test - 2017. If the on						ox and
	stop here. The organization qualifies a	s a publicly sup	ported organizatio	n			
	33 1/3% support test - 2016. If the on						
0	and stop here. The organization qualifi						
17:	10% -facts-and-circumstances test						
	and if the organization meets the "facts		-				
	meets the "facts-and-circumstances" to						
	10% -facts-and-circumstances test						
	Torre -tacts-and-circumstances test		-				
t	many and different states and all the	Tacts and circ					
	more, and if the organization meets the						
	more, and if the organization meets the organization meets the "facts-and-circu Private foundation. If the organization						

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2017.05050 ROOTED SCHOOL	213-18V1
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merchancise sold or services per- formed, or facilities furnished in any activity that is related to the organization's tax-exempt purpose						
3 Gross receipts from activities that	·		1	1		t
are not an unrelated trade or bus-	Í			1		
iness under section 513	Í .					
4 Tax revenues levied for the organ-			l		-	<u> </u>
ization's benefit and either paid to	Í			1		
or expended on its behalf	Í.					
5 The value of services or facilities			l	l	-	<u> </u>
furnished by a governmental unit to	Í			1		
the organization without charge	1	100				
6 Total. Add lines 1 through 5			<u> </u>	l	12 1	<u> </u>
7a Amounts included on lines 1, 2, and						
3 received from disgualified persons				1		
D Amounts included on lines 2 and 3 received		S			0 0	
from other than disqualified persons that	i i			1		
enceed the grazier of \$5,000 or 1% of the sensent on live 13 for the year	i i			1		
c Add lines 7a and 7b	·				8 8	<u> </u>
		-	<u> </u>			<u> </u>
8 Public support. (Satisfier Tetralies) Section B. Total Support		100		2.0		
Galendar year (or fiscal year beginning in)	1-1 0045	111 004 0	1-1 0045	140 0040	1-1 0047	
	(a) 2013	(b) 2014	(c) 2015	(d) 2016	(e) 2017	(f) Total
9 Amounts from line 6 10a Gross income from interest,		1				
dividends, payments received on securities loans, rents, royalties, and income from similar sources						
b Unrelated business taxable income						<u> </u>
(less section \$11 taxes) from businesses	Í .			1		
acquired after June 30, 1975	i i			1		
c Add lines 10a and 10b		92			2	
11 Net income from unrelated business	·					<u> </u>
activities not included in line 10b, whether or not the business is regularly carried on						
12 Other income. Do not include gain	(1			
or loss from the sale of capital assets (Explain in Part VI.)			1	1	S	
13 Total support. (Add lines 9, 10c, 11, and 12.)					S 10	
14 First five years. If the Form 990 is for	the organization	's first, second, th	rd, fourth, or fifth t	tax year as a secti	on 501(c)(3) organi	zation,
check this box and stop here						► F
Section C. Computation of Publ	ic Support Pe	ercentage				
15 Public support percentage for 2017 (the second second second second second second second second second second second second second second second se	column (fi)		15	
16 Public support percentage from 2016					16	
Section D. Computation of Inves						
17 Investment income percentage for 20				And the second second second	17	
18 Investment income percentage from:					18	
19a 33 1/3% support tests - 2017. If the						17 is not
more than 33 1/3%, check this box a						
b 33 1/3% support tests - 2016. If the						
line 18 is not more than 33 1/3%, che		-			-	
20 Private foundation. If the organization	n aid not check a	a pox on line 14, 19	sa, or 196, check t			
73/923 10-08-17			15	30	hedule A (Form 99	0 or 990-EZ) 2
10504 135000 013 110		17 05050	15			
210504 135992 213-1182	20000 20	17.05050	ROOTED SC	LOOL		213-18

(Complete only if you checked the box on line 10 of Part I or if the organization failed to qualify under Part II. If the organization fails to

Calendar year (or fiscal year beginning in) (a) 2013 (b) 2014 (c) 2015 (d) 2016 (e) 2017 (f) Total

 Schedule A (Form 990 or 990-E2) 2017 ROOTED SCHOOL
 47-1901769 Page 2

 Part III
 Support Schedule for Organizations Described in Sections 170(b)(1)(A)(v) and 170(b)(1)(A)(v)

 (Complete only if you checked the box on line 5, 7, or 8 of Part I or if the organization failed to qualify under Part III. If the organization failed to qualify under Part III. If the organization failed to qualify under Part III.

47-1901769 Page 2 ad 170(b)(1)(A)(v)
Schedule A (Form 990 or 990 E2) 2017 ROOTED SCHOOL
Part III Support Schedule for Organizations Described in Section 509(a)(2)

> 1 Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.")

O. Course and the American American

quality under the tests listed below, please complete Part II.) Section A. Public Support 47-1901769 Page 3

	7-1901769 Page4 Spectral a Ajrem We or security Control. 47-1901769 Pages Image: Spectral and Ajrem We or security Control. 1 1 Image: Spectral and Ajrem We or security Control. 1 1 Image: Spectral and Ajrem We or security Control. 1 1 Image: Spectral and Ajrem We or security Control. 1 1 Image: Spectral and Ajrem We or security Control. 1 1 Image: Spectral and Ajrem We or security Control. 1 1 Image: Spectral and Ajrem We or security Control. 1 1 Image: Spectral and Ajrem We or security Control. 1 1 Image: Spectral and Ajrem We or security Control. 1 1 Image: Spectral and Ajrem We or security Control. 1 1 Image: Spectral and Ajrem We or security Control. 1 1 Image: Spectral and Ajrem We or security Control. 1 1 Image: Spectral and Ajrem We or security Control. 1 1 Image: Spectral and Ajrem We or security Control. 1 1 Image: Spectral and Ajrem We or security Control. 1 1 Image: Spectral and Ajrem We or security Control. 1 1			
and B. If you checked 12b of Part I, complete Sections A and C. If you checked 12c of Part I, complete		11 Has the organization accented a off or contribution from any of the following persons?		-
All Supporting Organizations	Database Part M Compare: Source A and C Ver No And Part II. (compare: Source A and C Part II. (compare: Source A and C Part II. (compare: Source A and C Part III. (compare: Source A and C Part IIII. (compare: Source A and C Part IIII. (compare: Source A and C Part IIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIII			
	Yes No		110	ib l
f the organization's supported organizations listed by name in the organization's governing				
· · · · · · · ·				-
purpose, describe the designation. If historic and continuing relationship, explain.		control type roupporting organizations		7
		1. Did the deactory to steep or membership of one or more a prosted commissions have the power to		
tion was described in section 509(a)(1) or (2).	2			
	-			
organization nave a supported organization described in section sort(c)(4), (5), or (6)? // Tes, answer (c) below.				
	33			
				-
	a second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second s			
ition made the determination.	30			
organization ensure that all support to such organizations was used exclusively for section 170(c)(2)(B)	and the second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second se			
es? If "Yes," explain in Part VI what controls the organization put in place to ensure such use.	3c		2	<u>£</u>
y supported organization not organized in the United States ("foreign supported organization")? If		Section C. Type II Supporting Organizations		_
nd if you checked 12a or 12b in Part I, answer (b) and (c) below.	43			_
organization have ultimate control and discretion in deciding whether to make grants to the foreign				
ed organization? If "Yes," describe in Part VI how the organization had such control and discretion				
being controlled or supervised by or in connection with its supported organizations.	40	or management of the supporting organization was vested in the same persons that controlled or managed		
organization support any foreign supported organization that does not have an IRS determination		the supported organization(s).	1	ŧ.
ections 501(c)(3) and 509(a)(1) or (2)? If "Yes," explain in Part VI what controls the organization used		Section D. All Type III Supporting Organizations		
re that all support to the foreign supported organization was used exclusively for section 170(c)(2)(B)			153	_
5	4c	1 Did the organization provide to each of its supported organizations, by the last day of the fifth month of the		Π
organization add, substitute, or remove any supported organizations during the tax year? If "Yes,"		organization's tax year, (i) a written notice describing the type and amount of support provided during the prior tax		
(b) and (c) below (if applicable). Also, provide detail in Part VI, including (i) the names and EIN				
s of the supported organizations added, substituted, or removed; (ii) the reasons for each such action;		organization's governing documents in effect on the date of notification, to the extent not previously provided?	1	í.
uthority under the organization's organizing document authorizing such action; and (iv) how the action			1	_
omplished (such as by amendment to the organizing document).	53			
			2	
ted in the organization's organizing document?	50		-	÷
	57			
	~			
			0	-
				_
or benefit one or more of the filing organization's supported organizations? If "Tes," provide detail in			uctions).	
	•			
			(see instruction	30
	7			_
organization make a loan to a disqualified person (as defined in section 4958) not described in line 7?				
complete Part I of Schedule L (Form 990 or 990-EZ).	8			
e organization controlled directly or indirectly at any time during the tax year by one or more				
fed persons as defined in section 4946 (other than foundation managers and organizations described				
an 509(a)(1) or (2))? If "Yes," provide detail in Part VI.	9a		23	а
or more disqualified persons (as defined in line Sa) hold a controlling interest in any entity in which		b Did the activities described in (a) constitute activities that, but for the organization's involvement, one or more		
porting organization had an interest? If "Yes," provide detail in Part VI.	90	of the organization's supported organization(s) would have been engaged in? If "Yes," explain in Part VI the		
squalified person (as defined in line 9a) have an ownership interest in, or derive any personal benefit		reasons for the organization's position that its supported organization(s) would have engaged in these		
sets in which the supporting organization also had an interest? If "Yes," provide detail in Part VI.	9c	activities but for the organization's involvement.	2b	b
organization subject to the excess business holdings rules of section 4943 because of section		3 Parent of Supported Organizations. Answer (a) and (b) below.		
regarding certain Type II supporting organizations, and all Type III non-functionally integrated		a Did the organization have the power to regularly appoint or elect a majority of the officers, directors, or		
ing organizations)? If "Yes," answer 10b below.	10a		3a	a
organization have any excess business holdings in the tax year? (Use Schedule C, Form 4720, to				
ne whether the organization had excess business holdings.)	10b		Sh	
		and a support of a support of the support of the support of the support of the support of the support of the support of the support of the support of the support of the support of the support of the support of the support of the support of the support of the support of the support of the support of the support of the support of the support of the support of the support of the support of the support of the support of the support of the support of the support of the support of the support of the support of the support of the support of the support of the support of the support of the support of the support of the support of the support of the support of the support of the support of the support of the support of the support of the support of the support of the support of the support of the support of the support of the support of the support of the support of the support of the support of the support of the support of the support of the support of the support of the support of the support of the support of the support of the support of the support of the support of the support of the support of the support of the support of the support of the support of the support of the support of the support of the support of the support of the support of the support of the support of the support of the support of the support of the support of the support of the support of the support of the support of the support of the support of the support of the support of the support of the support of the support of the support of the support of the support of the support of the support of the support of the support of the support of the support of the support of the support of the support of the support of the support of the support of the support of the support of the support of the support of the support of the support of the support of the support of the support of the support of the support of the support of the support of the support of the support of the support of the support of the support of the support of the support of the su	00	-

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Schedule A (Form 990 or 990-EZ) 2017

ect	Son A - Adjusted Net Income		(A) Prior Year	(B) Current Year (optional)
1	Net short-term capital gain	1		8
2	Recoveries of prior-year distributions	2		
3	Other gross income (see instructions)	3		2
4	Add lines 1 through 3	4		
5	Depreciation and depietion	5		1
6	Portion of operating expenses paid or incurred for production or			· ·
	collection of gross income or for management, conservation, or			
	maintenance of property held for production of income (see instructions)	6		2.2
7	Other expenses (see instructions)	7		
_	Adjusted Net Income (subtract lines 5, 6, and 7 from line 4)	8		S
Bect	ion B - Minimum Asset Amount	-	(A) Prior Year	(B) Current Year (optional)
1	Aggregate fair market value of all non-exempt-use assets (see			3
	instructions for short tax year or assets held for part of year):			
а	Average monthly value of securities	1a		0
	Average monthly cash balances	1b		1
	Fair market value of other non-exempt-use assets	1c		2
-	Total (add lines 1a, 1b, and 1c)	1d		8
_	Discount claimed for blockage or other			
	factors (explain in detail in Part VI):			~
2	Acquisition indebtedness applicable to non-exempt-use assets	2		
	Subtract line 2 from line 1d	3		
4	Cash deemed held for exempt use. Enter 1-1/2% of line 3 (for greater amount,			10
	see instructions)	4		
5	Net value of non-exempt-use assets (subtract line 4 from line 3)	5		8
	Multiply line 5 by .035	6		
_	Recoveries of prior-year distributions	7		19
8		8		1
Bect	ion C - Distributable Amount			Current Year
1	Adjusted net income for prior year (from Section A, line 8, Column A)	1		
2		2		2
-	Minimum asset amount for prior year (from Section B, line 8, Column A)	3		
_	Enter greater of line 2 or line 3	4		1
_	Income tax imposed in prior year	5		2
	Distributable Amount. Subtract line 5 from line 4, unless subject to			
	emergency temporary reduction (see instructions)	6		

 Schedule A (Form 990 or 990 E2) 2017 ROOTED SCHOOL
 47-1901769 Page 6

 Part V
 Type III Non-Functionally Integrated 509(a)(3) Supporting Organizations

 1
 Check here if the organization satisfied the Integral Part Test as a qualitying funct on Nov. 20, 1970 (explain in Part VI) See instructions. All

a	Type III Non-Functionally Integrated 509	(a)(3) Supporting Orga	anizations (continued)	
ct	ion D - Distributions			Current Year
1	Amounts paid to supported organizations to accomplish exe	mpt purposes		
2	Amounts paid to perform activity that directly furthers exemp	t purposes of supported		
	organizations, in excess of income from activity			
3	Administrative expenses paid to accomplish exempt purpose	es of supported organization	5	
4	Amounts paid to acquire exempt-use assets			
5	Qualified set-aside amounts (prior IRS approval required)			
5	Other distributions (describe in Part VI). See instructions.			
7	Total annual distributions. Add lines 1 through 6.			
в	Distributions to attentive supported organizations to which the	he organization is responsive		
	(provide details in Part VI). See instructions.			
9	Distributable amount for 2017 from Section C, line 6			
D	Line 8 amount divided by line 9 amount			
ect	ion E - Distribution Allocations (see instructions)	(i) Excess Distributions	(ii) Underdistributions Pre-2017	(iii) Distributable Amount for 2017
1	Distributable amount for 2017 from Section C. line 6			
2	Underdistributions, if any, for years prior to 2017 (reason-			
	able cause required- explain in Part VI). See instructions.			
3	Excess distributions carryover, if any, to 2017			
a				
_	From 2013			
_	From 2014			
-	From 2015			
_	From 2015			-
_	Total of lines 3a through e			
	Applied to underdistributions of prior years			
	Applied to 2017 distributable amount			
	Carryover from 2012 not applied (see instructions)			
	Remainder. Subtract lines 3g, 3h, and 3i from 3f.			
•	Distributions for 2017 from Section D,			
_	ine 7: \$			
	Applied to underdistributions of prior years			
_	Applied to 2017 distributable amount			<u></u>
	Remainder. Subtract lines 4a and 4b from 4.			
5	Remaining underdistributions for years prior to 2017, if			
	any. Subtract lines 3g and 4a from line 2. For result greater			
_	than zero, explain in Part VI. See instructions.			
5	Remaining underdistributions for 2017. Subtract lines 3h			
	and 4b from line 1. For result greater than zero, explain in			
_	Part VI. See instructions.			· · · · · · · · · · · · · · · · · · ·
7	Excess distributions carryover to 2018. Add lines 3j			
	and 4c.			
3	Breakdown of line 7:			
а	Excess from 2013			
b	Excess from 2014			
c	Excess from 2015			
d	Excess from 2016			
e	Excess from 2017			

chedule A (Form 990 or 990-E2) 2017 ROOTED SCHOOL	47-1901769 Page 8
Part VI Supplemental Information. Provide the explanations required by Part II, the 40; Part II, Ine 41 Part IV, Section A, Ines 1, 2, 80, 8c, 40, 4c, 5a, 6, 5a, 5b, 5c, 11a, 11b, and 11c; Part IV, Section B, Iir line 1; Part IV, Section D, Iines 2 and 3; Part IV, Section E, Iines 1c, 2a, 2b, 3a, and 8b, Part V, Iine 1; P Section D, Iines 5, 6, and 8; and Part V, Section E, Iines 2, 5, and 6. Also complete this part for any ad (See instructions.)	nes 1 and 2; Part IV, Section C, Part V, Section B, line 1e; Part V,

Schedule B (Form 990, 990-EZ,	Schedule of Contributors Attach to Form 990, Form 990-EZ, or Form 990-PF.	GMB No. 1515-001
or 990-PF) Department of the Treasury Internal Revenue Service	Go to www.irs.gov/Form990 for the latest information.	2017
Name of the organizati	on	Employer identification n
	ROOTED SCHOOL	47-1901769
Organization type(cheo	k onej:	14
Filers of:	Section:	
Form 990 or 990-EZ	X 501(c)(3) (enter number) organization	
	4947(a)(1) nonexempt charitable trust not treated as a private foundation	
	527 political organization	
Form 990-PF	501(c)(3) exempt private foundation	
	4947(a)(1) nonexempt charitable trust treated as a private foundation	

Note: Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.

General Rule

If an an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling \$5,000 or more (in money or property) from any one contributor. Complete Parts I and II. See instructions for determining a contributor's total contributions.

Special Rules

- For an organization described in section 501(c)(8) filing Form 990 or 990-EZ that met the 83 1/8% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(0), that checked \$\circ Checkule A (Form 990 or 990-EZ), Part II, line 18, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of (1) \$\$,000; or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h; or (i) Form 990-EZ, In-1. Complete Parts I and II.
- For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 exclusively for religious, chartable, scientific, Iterary, or educational purposes, or for the prevention of curety to children or anomals. Complete Parts I, II, and III.

Caution: An organization that Isn't covered by the General Rule and/or the Special Rules doesn't file Schedule B (Form 990, 990 EZ, or 990 PF), but it must answer 'No' on Part IV, line 2, of its Form 990, or check the box on line H of its Form 990 EZ or on its Form 990 PF, Part I, line 2, to certify that it doesn't meet the filing requirements of Schedule B (Form 990, 990 EZ, or 990 PF).

LHA For Paperwork Reduction Act Notice, see the instructions for Form 990, 990-EZ, or 990-PF. Schedule B (Form 990, 990-EZ, or 990-PF) (2017)

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Schedule A (Form 990 or 990-EZ) 2017

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Name of or	ganization		Employer identification number
ROOTE	D SCHOOL		47-1901769
Part I	Contributors (see instructions). Use duplicate copies of Part I if addition	al space is needed.	
(2) No.	(b) Name, address, and ZIP + 4	(C) Total contribution	(d) IS Type of contribut
1	NEW SCHOOLS FOR NEW ORLEANS		Person X Payroli
	1555 POYDRAS ST SUITE 781 NEW ORLEANS, LA 70112	\$ 273,85	50. Noncash (Complete Part II for noncash contributio
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contribution	(d) Is Type of contribut
2	NEW SCHOOLS VENTURE FUND		Person X
	1616 FRANKLIN STREET, SECOND FLOOR	\$135,00	Payroll
	OAKLAND, CA 94612		noncash contributio
(a) No.	(b) Name, address, and ZIP + 4	(C) Total contribution	(d) Is Type of contribut
3	THE MIND TRUST		Person X
	1630 N MERIDIAN ST	\$50,00	00. Payroll Noncash (Complete Part II for
	INDIANAPOLIS, IN 46202		noncash contributio
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contribution	(d) Is Type of contribut
4	WALTON FAM FDN		Person X
	P.O. BOX 2030	\$325,00	
	BENTONVILLE, AR 72712		noncash contributio
(a) No.	(b) Name, address, and ZIP + 4	(C) Total contribution	(d) Is Type of contribut
5	YOUTH FORCE NOLA		Person X
	625 CELESTE STREET, MAILBOX 108	\$30,00	00. Payroll Noncash (Complete Part II for
	NEW ORLEANS, LA 70130		noncash contributio
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contribution	(d) Is Type of contribut
6	DELL (VIA 4.0 SCHOOLS)		Person X
	612 ANDREW HIGGINS BLVD 3RD FLOOR	\$\$	00. Noncash (Complete Part II for
723452 11-0	NEW ORLEANS, LA 70130	Schedule P	noncash contributio

Name of org	3 (Form 990, 990-EZ, or 990-PF) (2017) janizabon		Employe	er identification number
ROOTEI	SCHOOL		47.	-1901769
Part II	Noncash Property (see instructions). Use duplicate copies of Part II if:	additional space is neede		1901/09
(a)		1		
No.	(b)	(=)		(d)
from	Description of noncash property given	FMV (or estimate (See instructions		Date received
Part I		(See insudedons	~1	
		\$		
(a) No.		(c)		
from	(b) Description of noncash property given	FMV (or estimate	=)	(d) Date received
Part I	Description of Horicash property given	(See instructions		Datereceived
		\$		
(a)		(7)		
No.	(b)	(C) FMV (or estimate	-	(d)
from	Description of noncash property given	(See instructions		Date received
Part I			'	
		3		
(a) No.		(C)		
from	(b) Description of noncash property given	FMV (or estimate	=)	(d) Date received
Part I	esse paul a manazar property great	(See instructions	r.)	
		\$	—	
(a)		(c)		
No.	(b)	FMV (or estimate	-)	(d)
from Part I	Description of noncash property given	(See instructions		Date received
		\$		
(a)				
No.	(b)	(⊂)		(a)
from	Description of noncash property given	FMV (or estimate		Date received
Part I		(See instructions	-1	
/2452 11-01		\$Schedule	B (Form 9	190, 990-EZ, or 990-PF)
	23			

	SCHOOL		47-	identhication number
Part III	Exclusively religious, charnable, etc., committe year from any one contributor. Complete co- completing Part II, enter the total of exclusively religious,	charitable, etc., contributions of \$1,000 o	n section SU (()(/), (8), or (10) that to wing line entry. For organizations r less for the year. (alter bisicit. onc.)	tai more than \$ 1,000
a No.	Use duplicate copies of Part III if additional	space is needed.		
a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of	how gift is held
	Transferee's name, address, and	(e) Transfer of gi	tt Relationship of transferor to	transferee
a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of	how gift is held
		(e) Transfer of gi		
	Transferee's name, address, and		Relationship of transferor to	transferee
a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of	how gift is held
_				
	Transferee's name, address, and	(e) Transfer of gil 1ZIP + 4	Relationship of transferor to	transferee
a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of	how gift is held
		(e) Transfer of gi		
	Transferee's name, address, and	1ZIP+4	Relationship of transferor to	transferee
3454 11-01-1	77		Schedule B (Form 990	990-EZ or 990-PF

Departs	m 990)	Part IV line	ete if the org	anization answ	al Statements red "Yes" on Form 990, 11d, 11e, 11f, 12a, or 12b.		2017		
Information	interest of the Trazery	Go to www.in	s.gov/Forms	Attach to Form 90 for instructio	990. Ins and the latest informat	ion.	Inspection		
	e of the organizatio		-				ployer identification nu		
	-	ROOTED SCHO	OL				47-1901769		
Par	rt I Organiza	ations Maintaining Do	nor Advise	ed Funds or (Other Similar Funds o	r Acco	UNTS. Complete if the		
_	organization	n answered "Yes" on Form 9	90, Part IV, In	ne 6.					
				(a) Dono	r advised funds	(b) Fu	nds and other accounts		
1	Total number at en	nd of year							
2	Accessorie waters of	f contributions to (during yea	-						
		f grants from (during year)							
		t end of year							
		on inform all donors and done			and bold in door of the				
5							Yes [
-		on's property, subject to the							
6		on inform all grantees, donors							
		oses and not for the benefit	of the donor (or donor advisor,	or for any other purpose co	nterring			
_	impermissible priva						Yes		
Par	rt II Conserva	ation Easements. Com	plete if the on	ganization answe	ared "Yes" on Form 990, Pa	rt IV, line 7	7.		
1	Purpose(s) of cons	servation easements held by	the organizat	tion (check all that	t appiy).				
	Preservation	of land for public use (e.g., i	recreation or 4	education)	Preservation of a histori	cally impo	rtant land area		
	Protection of	f natural habitat			Preservation of a certific	d historic	structure		
	Preservation	n of open space							
2	Complete lines 2a	through 2d if the organizatio	n heid a qual	fied conservation	contribution in the form of	aconserv	ation easement on the L		
	day of the tax year						Held at the End of the Ta		
		onservation easements				22			
		nicted by conservation easen				2b			
		vation easements on a certifi		acture included	in (3)	20			
a		vation easements included in nal Register			io not on a resource solucione				
	Number of conserv	20	and asimo dina dana						
9		in during the tax							
	year >								
5		tion have a written policy reg							
	violations, and entit	forcement of the conservation	n easements	rt holds?			Yes L		
6	Staff and voluntee	r hours devoted to monitorin	g, inspecting,	handling of viola	ations, and enforcing conse	vation ea	sements during the year		
7	Amount of expensi	es incurred in monitoring, ins	specting, han	dling of violations	s, and enforcing conservation	0.0350000	ints during the year		
	> \$					Carbon in			
8		vation easement reported on							
		(4)(B)(II)?				(4)(B)()			
	and section 170(h)					(4)(B)()	Yes 🗆		
	and section 170(h) In Part XIII, describ	be how the organization repo	rts conservat			(4)(B)(I)	Yes and balance sheet, and		
	in Part XIII, descrit	be how the organization repo ble, the text of the footnote to	ons conservat	ion easements in	its revenue and expense s	(4)(B)() Latement,			
	in Part XIII, descrit	be now the organization repo ble, the text of the footnote to	ons conservat	ion easements in	its revenue and expense s	(4)(B)() Latement,			
9	in Part XIII, descrip include, if applicab conservation ease	be now the organization repo ble, the text of the footnote to	o the organiza	ion easements in ition's financial si	its revenue and expense s tatements that describes th	(4)(B)() Latement, e organiza	ation's accounting for		
9	include, if applicab conservation ease rt III Organiza	be now the organization repo ble, the text of the footnote to ments.	o the organiza	tion easements in ation's financial s of Art, Histori	its revenue and expense s tatements that describes th cal Treasures, or Oth	(4)(B)() Latement, e organiza	ation's accounting for		
9 Par	nclude, if applicab conservation ease rt III Organiza Complete if	be now the organization repo ole, the text of the footnote to ements. ations Maintaining Co f the organization answered f	o the organiza Illections o 'Yes' on Form	tion easements in tion's financial si of Art, Histori n 990, Part IV, In	its revenue and expense s latements that describes th cal Treasures, or Oth e 8.	(4)(B)() tatement, e organiza er Simi	ation's accounting for		
9 Par	in Part XIII, describ include, if applicab conservation ease rt III Organiza Complete if if the organization	e now the organization repo ole, the text of the footboth to ments. ations Maintaining Co f the organization answered ' elected, as permitted under	offections o "Yes" on Form SFAS 116 (A)	tion easements in tion's financial si of Art, Histori n 990, Part IV, lin SC 958), not to m	n its revenue and expense si latements that describes th call Treasures, or Oth e 8. sport in its revenue stateme	(4)(B)() tatement, e organiza er Simi nt and bal	ation's accounting for lar Assets. lance sheet works of art,		
9 Par	In Part XII, describ Include, if applicab conservation ease rt III Organiza Complete if If the organization historical treasures	be now the organization repo ole, the text of the footnote to ements. ations Maintaining Co f the organization answered f	Ilections of "Yes" on Form SFAS 116 (A) of for public ex	tion easements in ition's financial st of Art, Histori n 990, Part IV, Im SC 958), not to m hibition, educatio	ts revenue and expense st latements that describes th call Treasures, or Oth e 8. gort in its revenue stateme an, or research in furtherance	(4)(B)() tatement, e organiza er Simi nt and bal	ation's accounting for lar Assets. lance sheet works of art,		
9 Par 1a	In Part XIII, descrit include, if applicab conservation ease till Organiza Complete if If the organization historical treasures the text of the foot	e now the organization repo ele, the text of the footnote to ments. ations Maintaining Co (the organization answered ' elected, as permitted under s, or other similar assets heic those to its financial statement	Ilections o "Yes" on Fom SFAS 116 (A) d for public ex nts that descr	tion easements in ition's financial st of Art, Histori n 990, Part IV, Im SC 958), not to m hibition, education ribes these flems	n its revenue and expense si latements that describes th cal Treasures, or Oth e 8. aport in its revenue stateme an, or research in furtheranc	(4)(B)() tatement, e organiza er Simi nt and bai e of public	ation's accounting for lar Assets. lance sheet works of art, c service, provide, in Par		
9 Par 1a	In Fart XII, description include, if applicable conservation ease Complete if If the organization historical treasures the text of the foot If the organization	the now the organization repo paie, the test of the footnote to membs. ations Maintaining Co (the organization answered ' elected, as permitted under s, or other similar assets held horte to to financial stateme elected, as permitted under	Ilections o "Ves" on Form SFAS 116 (A/ d for public ex nts that descr SFAS 116 (A/	tion easements in tition's financial st of Art, Histori n 990, Part IV, lin SC 958), not to in hibition, educatio fibes these fiems SC 958), to report	is revenue and expense s latements that describes th cal Treasures, or Oth e 8. eport in its revenue stateme on, or research in furtheranc t in its revenue statement a	(4)(B)() tatement, e organiza er Simi nt and bal e of public nd balanc	ation's accounting for lar Assets. lance sheet works of art, c service, provide, in Par re sheet works of art, his		
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9 Par 1a	In Part XII, description Include, if applicabil conservation ease the transmission of the If the organization Instorical treasures the text of the foot If the organization treasures, or other relating to these its	be now the organization repo be, the text of the footnote to ments. ations Maintaining Co the organization answered relected, as permitted under s, or other similar assets held horde to is financial statemer elected, as permitted under r similar assets held for public ems:	Illections of "Yes" on Form SFAS 116 (Al d for public ex nts that descr SFAS 116 (Al c exhibition, e	ion easements in ition's financial si of Art, Histori n 990, Part IV, lin SC 958), not to in hibition, educatio nibes these fitems SC 958), to report diucation, or rese	Its revenue and expense is atements that describes th call Treasures, or Oth e 8. aport in its revenue stateme n, or research in furtheranc t in its revenue statement a sarch in furtherance of public	(4)(B)() atement, e organiza er Simi nt and balanc nd balanc c service,	ation's accounting for lar Assets. lance sheet works of art, c service, provide, in Par re sheet works of art, his		
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9 Par 1a b	In Part XII, description include, if applicable conservation ease Complete if If the organization historical treasures the text of the foot if the organization treasures, or other relating to these it to (i) Revenue incluid (ii) Assets include	be now the organization repo be, the text of the footnote tr ments. ations: Maintaining Co I the organization answered elected, as permitted under s, or other similar assets held boote to its financial statemen elected, as permitted under similar assets held for publik ems: ded on Form 990, Part X	Illections of "Yes" on Form SFAS 116 (A) of the public ex nts that descr SFAS 116 (A) c exhibition, e	tion easements in dion's financial si of Art, Histori n 990, Part IV, Im SC 958), not to n hibition, educatio hibition, education SC 958), to repor ducation, or rese	Its revenue and expense is alternetis that describes th call Treasures, or Oth e 8. Doport in ts revenue statement an, or research in furtherance it in its revenue statement a sarch in furtherance of public	(4)(B)() tatement, e organiza er Simi nt and balanc nd balanc c service,	tion's accounting for lar Assets. lance sheet works of art, c service, provide, in Par ic sheet works of art, his provide the following an \$\$		
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9 Par 1a b	In Park All, deschur include, if applicab conservation ease Complete if If the organization historical treasures the text of the foot if the organization treasure, or other relating to these the (ii) Revenue inclus (iii) Assets included if the organization	be now the organization repo be, the text of the footnote tr ments. Stions: Maintaining Co if the organization answered ' elected, as permitted under s, or other similar assets held those to its financial statemes elected, as permitted under similar assets held to public emis: deci no Form 990, Part VIII, h ed in Form 990, Part VIII, intis required to be reported	Ilections of the organical of the organical set on Form SFAS 116 (A) of or public ex- stat description, e under SFAS 116 (A) c exhibition, e ine 1	tion easements in titon's financial st of Art, Histori n 990, Part IV, lin 900 958), not to n hibition, educatio bites these items SC 958), to report ducation, or rese ducation, or rese baseures, or other 116 (ASC 958) re	Its revenue and expense si its revenue and expenses is call Treasures, or Oth e 8. oport in its revenue statement r, or research in furtherance t in its revenue statement a sanch in furtherance of public similar assets for financial g similar assets for financial g	(4)(B)() tatement, e organiza er Simi nt and balanc nd balanc c service,	tion's accounting for lar Assets. lance sheet works of art, c service, provide, in Par ic sheet works of art, his provide the following an \$\$		
9 Par 1a b 2	In Park All, deschur include, if applicabil conservation eases Complete if If the organization before a treasures the text of the foot if the organization the text of the foot if the organization (ii) Revenue include if the organization the following amou the following amou	be now the organization repo be, the text of the footnote to ments. Stions Maintaining Co f the organization answered ' elected, as permitted under s, or other similar assets held into to its financial statement elected, as permitted under similar assets held for public emis: and on Form 990, Part VIII, its ded on Form 990, Part VIII, its on Form 990, Part VIII, its	Ilections of the organical of the organical set on Form SFAS 116 (A) of or public ex- stat description, e under SFAS 116 (A) c exhibition, e ine 1	tion easements in titon's financial st of Art, Histori n 990, Part IV, lin 900 958), not to n hibition, educatio bites these items SC 958), to report ducation, or rese ducation, or rese baseures, or other 116 (ASC 958) re	Its revenue and expense si its revenue and expenses is call Treasures, or Oth e 8. oport in its revenue statement r, or research in furtherance t in its revenue statement a sanch in furtherance of public similar assets for financial g similar assets for financial g	(4)(B)() tatement, e organiza er Simi nt and balanc nd balanc c service,	tion's accounting for lar Assets. lance sheet works of art, c service, provide, in Par ic sheet works of art, his provide the following an \$\$		
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9 Par 1a b 2 a b	In Park All, deschin mckule, if applicab conservation ease Organizat Organization historical treasures the text of the foot if the organization treasures, or other treasures, or other the organization the following amo. Revenue included in	be now the organization repo be, the text of the footnote to ments. Stions Maintaining Co f the organization answered ' elected, as permitted under s, or other similar assets held into to its financial statement elected, as permitted under similar assets held for public emis: and on Form 990, Part VIII, its ded on Form 990, Part VIII, its on Form 990, Part VIII, its	or the organica of the organica of the organica SFAS 116 (A) for public ex- stat descr SFAS 116 (A) c exhibition, e ine 1 	tion easements in tion's financial is of Art, Histori n 990, Part IV, lin SC 958), not to in hibition, educatio hibition, education, education, SC 958), to report ducation, or rese easures, or other 116 (ASC 958) re	Its revenue and expense si its revenue and expenses is call Treasures, or Oth e 8. oport in its revenue statement r, or research in furtherance t in its revenue statement a sanch in furtherance of public similar assets for financial g similar assets for financial g	(4)(B)() tatement, e organiza er Simi nt and balanc nd balanc c service,	tion's accounting for lar Assets. lance sheet works of art, c service, provide, in Par ic sheet works of art, his provide the following an \$\$		
9 Par 1a b 2 a b UHA	In Park All, deschin mckule, if applicab conservation ease Organizat Organization historical treasures the text of the foot if the organization treasures, or other treasures, or other the organization the following amo. Revenue included in	be now the organization repo be to the organization repo attions Maintaining Co the organization answerd the organization answerd elected, as permitted under s, or other similar assets held for other similar assets held for public elected, as permitted under r similar assets held for public ems: ded on Form 990, Part VIII, he din Form 990, Part VIII, no Form 990, Part X	or the organica of the organica of the organica SFAS 116 (A) for public ex- stat descr SFAS 116 (A) c exhibition, e ine 1 	tion easements in tion's financial s' of Art, Histori n 990, Part IV, lin SC 956), not to n hibition, educatio files these items SC 956), to report ducation, or reso easures, or other 116 (ASC 956) re	Its revenue and expense is adments that describes th call Treasures, or Oth e 8. Or research in furtherance or research in furtherance it in fis revenue statement a sarch in furtherance of public similar assets for financial g along to these items:	(4)(B)() tatement, e organiza er Simi nt and balanc nd balanc c service,	tion's accounting for lar Assets. lance sheet works of art, c service, provide, in Par e sheet works of art, his provide the following an \$		
9 Par 1a b 2 a b LHA 75000	In Park All, declar include, if applicabil conservation eases Complete if If the organization the torial treasures the text of the food if the organization if the organization (ii) Assets include if the organization (iii) Assets include if the following arrow Revenue included Assets included in Assets included in Assets included in 1 144-17	be now the organization repo be to the organization repo attions Maintaining Co the organization answerd the organization answerd elected, as permitted under s, or other similar assets held for other similar assets held for public elected, as permitted under r similar assets held for public ems: ded on Form 990, Part VIII, he din Form 990, Part VIII, no Form 990, Part X	Illections of the organical of the organical of the organical of the organical sectors of the organical of the organical the storical the under SFAS 11 the instruction	tion easements in thor's financial s' of Art, Historia 990, Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part IV, Im 90 Part I	Its revenue and expenses is atterments that exportes the call Treasures, or Oth e 8. aport in its revenue statement in its revenue statement a arach in furtherance of public similar assets for financial g atting to these items:	(4)(B)() tatement, e organiza er Simi nt and balanc nd balanc c service,	tion's accounting for lar Assets. lance sheet works of art, c service, provide, in Par e sheet works of art, his provide the following an \$		

Dai	t III Organizations Maintaining (rt Historia	al Tre	asures or Ot	hor o		-19017	
	Using the organization's acquisition, access								
5	(check all that apply):	ion, and other record	is, check any	or the to	sowing that are a	asgni	cant use o	or its collect	oon nems
	Public exhibition				ange programs				
b	Scholarty research			orexon					
-	Preservation for future generations	•							
c							0.000	-	
	Provide a description of the organization's o				-		• •	Part XIII.	
2	During the year, did the organization solicit of								
	to be sold to raise funds rather than to be m		-					Yes	
d	t IV Escrow and Custodial Arran		ete if the orga	niteration	answered "Yes"	on For	m 990, Pa	rt IV, line 9,	or
_	reported an amount on Form 990, Pa			-					
2	is the organization an agent, trustee, custod						uded		
	on Form 990, Part X?							Yes	
b	If "Yes," explain the arrangement in Part XIII	and complete the fo	slowing table:			E			
								Amo	Int
c	Beginning balance						1c		
	Additions during the year						1d		
	Distributions during the year						1e		
f	Ending balance						11		
3	Did the organization include an amount on F	orm 990, Part X, line	21, for escro	w or cus	todial account lia	bility?		Yes	
b	If "Yes," explain the arrangement in Part XIII	Check here if the e	xplanation ha	s been p	rovided on Part)	an			
a	t V Endowment Funds. Complete	f the organization ar	swered "Yes	on For	n 990, Part IV, lin	e 10.			
		(a) Current year	(b) Prior y	car	(c) Two years back	(d) 1	hree years h	back (e) Fo	ur years l
2	Beginning of year balance	98-98 - 88 - 8	22228 22	1		1000		1,200	
	Contributions								
c	Net investment earnings, gains, and losses							1	
	Grants or scholarships	2				-			
	Other expenditures for facilities					+			
	and programs								
	Administrative expenses			-		+		-	
				-+		+			
	End of year balance Provide the estimated percentage of the cur	and up to and halans		and the second second	hald as:	_		_	
	Board designated or quasi-endowment		te (ine ig. co	(4)	INCIU do.				
			20						
	Permanent endowment	96							
c	Temporarily restricted endowment	96							
	The percentages on lines 2a, 2b, and 2c sho								
2	Are there endowment funds not in the poss	ession of the organiz	ation that are	heid and	d administered fo	r the o	rganization	1	
	by:								Yes
	(i) unrelated organizations							3a)
	(ii) related organizations							3a(i	-
b	If "Yes" on line Sa(i), are the related organiz							36	
	Describe in Part XIII the intended uses of the		wment funds	i.					
	t VI Land, Buildings, and Equip								
a				11a Se	e Form 990, Part	X, Inc	10.		
a	Complete if the organization answere		ther (t) Cost o			nulated	(d) Bo	ook value
a	Complete if the organization answere Description of property	(a) Cost or c							
a		(a) Cost or o basis (investi		basis (o	ther) (peprec	ation		
				basis (o	ther) (seprec	ation		
2	Description of property	basis (investi		basis (o	ther) (eprec	ation		
ab	Description of property	basis (investi		basis (o	ther) (nchuec	ation		
ab	Description of property Land Buildings Leasehold improvements	basis (investi		basis (o	ther) (peprec	ation		
abcd	Description of property Land Buildings	basis (investi		basis (o		petrec	ation		

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16210504 135992 213-11828000	2017.05050 ROOTED SCHOOL	213-18V1

Schedule D (Form 990) 2017 ROOTED SCHOO)L		47-	-1901769 Page
Part VII Investments - Other Securities.		11 C 1 C 1 C 1 C 1 C 1 C 1 C 1 C 1 C 1		
Complete if the organization answered "Yes" of	n Form 990, Part IV, Iir	e 11b. See Form 990, F	art X, line 12.	
(a) Description of security or category (including name of security)	(b) Book value	(c) Method of val	uation: Cost or end	of-year market value
1) Financial derivatives				
2) Closely-heid equity interests				
3) Other				
(A)		1		
(B)				
(C)				
(D)				
(F)				
(F)				
(G)				
(H)				
otal. (Col. (b) must equal Form 990, Part X, col. (B) line 12.) 🕨	1	2		
Part VIII Investments - Program Related.				
Complete if the organization answered "Yes" of	n Form 990, Part IV, In	e 11c. See Form 990, P	art X, line 13.	
(a) Description of investment	(b) Book value			of-year market value
(1)				
(2)				
(3)				
(4)				
(5)				
(6)				
(7)				
(8)				
(9)		1		
otal. (Col. (b) must equal Form 990, Part X, col. (B) line 13.)				
Part IX Other Assets.				
Complete if the organization answered "Yes" of	n Form 990, Part IV, In	e 11d. See Form 990, F	art X, line 15.	
	escription			(b) Book value
(1)				
(2)				
(3)				
(4)				
(5)				
(6)				
(7)				C
(8)				
(9)				
Total. (Column (b) must equal Form 990, Part X, col. (B) line	15)			
Part X Other Liabilities.	104			
Complete if the organization answered "Yes" of	n Form 990 Part IV In	e the or tif See Form	990 Part X line 25	
(a) Description of liability		(b) Book value		•
(1) Federal income taxes				
(2)				
(3) (4)				
(5)				

(6) (7) (8)

732053 10-00-17

(9) Total. (Column (b) must equal Form 990, Part X, col. (8) line 25.) .

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Complete if the organization answered "Yes" on Form 990, Part I	Statements With Rever V, Ine 12a.		
Total revenue, gains, and other support per audited financial statements		1	1,504,697
Amounts included on line 1 but not on Form 990. Part VIII, line 12:			
a Net unrealized gains (losses) on investments	2a		
b Donated services and use of facilities			
c Recoveries of prior year grants			
d Other (Describe in Part XIII.)	2d		
e Add lines 2a through 2d		2e	0
Subtract line 2e from line 1		3	1,504,697
Amounts included on Form 990, Part VIII, line 12, but not on line 1:			
a Investment expenses not included on Form 990, Part VIII, line 7b	43		
b Other (Describe in Part XIII.)	4b		
c Add lines 4a and 4b		4c	0
5 Total revenue. Add lines 3 and 4c. (This must equal Form 990, Part I, line	. 12.)	5	1,504,697
Complete if the organization answered "Yes" on Form 990, Part I Total expenses and losses per audited financial statements		1	1,422,903
a Donated services and use of facilities	23		
b Prior year adjustments			
c Other losses			
d Other (Describe in Part XIII.)	2d		
e Add lines 2a through 2d		2e	0
			1,422,903
Subtract line 2e form line 1 Amounts included on Form 990, Part IX, line 25, but not on line 1:			
Subtract line 2e from line 1	43		
Subtract line 2e from line 1			
Subtract line 2e from line 1 Amounts included on Form 990, Part IX, line 25, but not on line 1: a Investment expenses not included on Form 990, Part VIII, line 7b b Other (Desche in Part XIII.)	4b	4c	0
Subtract line 2e from line 1	45		0

C Add thes 44 and 40	
5 Total expenses. Add lines 3 and 4c. (This must equal Form 990, Part I, line 18.) 5 1, 422, 903.	
Part XIII Supplemental Information.	
Provide the descriptions required for Part II, lines 3, 5, and 9; Part III, lines 1a and 4; Part IV, lines 1b and 2b; Part V, line 4; Part X, line 2; Part X0,	
lines 2d and 4b; and Part XII, lines 2d and 4b. Also complete this part to provide any additional information.	
PART X, LINE 2:	
THE COULD TO A MONTPOORTE DISTANCE THAT THE DAMAGE OF THEORY PARTY	
THE SCHOOL IS A NONPROFIT ENTITY EXEMPT FROM THE PAYMENT OF INCOME TAXES	
UNDER INTERNAL REVENUE CODE SECTION 501(C)(3). ACCORDINGLY, NO PROVISION	
HAS BEEN MADE FOR INCOME TAXES. MANAGEMENT HAS DETERMINED THAT ALL INCOME	
TAX POSITIONS ARE MORE LIKELY THAN NOT OF BEING SUSTAINED UPON POTENTIAL	
AUDIT OR EXAMINATION; THEREFORE, NO DISCLOSURES OF UNCERTAIN INCOME TAX	
POSITIONS ARE REQUIRED. THE SCHOOL FILES INFORMATIONAL RETURNS IN THE U.S.	
POSITIONS ARE REQUIRED. THE SCHOOL FILES INFORMATIONAL RETORNS IN THE U.S.	
FEDERAL JURISDICTION. THE STATUTE OF LIMITATIONS FOR FEDERAL PURPOSES IS	
GENERALLY THREE YEARS.	

		TERNA								-			
HAS	BEEN	MADE	FOR	INCO	ME T.	AXES.	. MAN	AGEMI	INT I	IAS 1	DETE	RMIN	ED '
TAX	POSI	TIONS	ARE	MORE	LIK	ELY 1	PHAN	NOT	F BE	ING	SUS	TAIN	ED
AUD	IT OF	EXAM	INATI	ON;	THER	EFORI	E, NO	DISC	LOSU	JRES	OF	UNCE	RTA
POS	TTTON	IS ARE	REOL	ITRED	TH	E SCI	1001.	RILES	5 TNF	MROF	ATT 0	NAT.	RETI

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Schedule D (Form 990) 2017

213-18V1

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Schedule D (Form 990) 2017 ROOTED SCHOOL Part XIII Supplemental Information (continued)

Schedule D (Form 990) 2017

213-18V1

47-1901769 Page 5

SCI	HEDULE E	Schools	L	OME No. 1	1545-00	17
(For	m 990 or 990-EZ)	Complete if the organization answered "Yes" on Form 990,	Г	20	17	
		Part IV, line 13, or Form 990-EZ, Part VI, line 48.				
Departs	ment of the Treasury Nevenue Service	Attach to Form 990 or Form 990-EZ. Go to www.irs.gov/Form990 for the latest information.		Open to Inspect		C
	of the organization		Employer id			mih ar
	e or the organizatio					
		ROOTED SCHOOL	11	-1901	109	
Par	T				YES	NO
	-				TES	NO
		tion have a racially nondiscriminatory policy toward students by statement in its charter, by	205,		x	
		strument, or in a resolution of its governing body?	-	1	•	
		tion include a statement of its racially nondiscriminatory policy toward students in all its bro				
	-	ther written communications with the public dealing with student admissions, programs, an	-	s? 2	х	
		on publicized its racially nondiscriminatory policy through newspaper or broadcast media d				
		on for students, or during the registration period if it has no solicitation program, in a way th				
		o all parts of the general community it serves? If "Yes," please describe. If "No," please exp	lain.			
		pace, use Part II		3	х	
		MINATORY POLICY AVAILABLE THROUGH ITS WEBSITE	AND ON	_ _ !		
	MARKETING	MATERIALS FOR NEW STUDENTS.		-		
				_ _ !		
				_ _ !		
				_ _ '		
4	Does the organization	tion maintain the following?				
a	Records indicating	the racial composition of the student body, faculty, and administrative staff?		4a	х	
b	Records document	ting that scholarships and other financial assistance are awarded on a racially nondiscrimin	atory basis?	4b		х
c	Copies of all catal	ques, brochures, announcements, and other written communications to the public dealing	with student			
	admissions, progra	ams, and scholarships?		4c	х	
d	Copies of all mate	rial used by the organization or on its behalf to solicit contributions?		4d	х	
		to to any of the above, please explain. If you need more space, use Part II.				
		L DOES NOT PROVIDE ANY SCHOLARSHIPS OR FINANCE	LAL			
	ASSISTANC	Ε.		-		
				-		
				-		
5	Does the organizat	tion discriminate by race in any way with respect to:		-		
	-	r privileges?		5a		х
		5?				x
		cuty or administrative staff?		5c		x
		her financial assistance?		50		x
		S?		5e		x
						X
	Athletic programs			5q		X
		iar activities?		<u>>g</u> 5h		x
		es' to any of the above, please explain. If you need more space, use Part II.		<u>sn</u>		-
	- you arewared -	to any or and above, prease explaint if you need more space, use Part II.				
				- []		
				-		
				-		
				_		
		tion receive any financial aid or assistance from a governmental agency?		<u>6a</u>	х	
		on's right to such aid ever been revoked or suspended?		<u>6b</u>		х
		es" on either line 6a or line 6b, explain on Part II.				
		tion certify that it has complied with the applicable requirements of sections 4.01 through 4	.05 of			
	Rev. Proc. 75-50,	1975-2 C.B. 587, covering racial nondiscrimination? If "No," explain on Part II		7	х	
LHA	For Paperwork R	eduction Act Notice, see the Instructions for Form 990 or Form 990-EZ.	Schedule E (Fo	rm 990 or	990-EZ	2017

213-18V1

	Supplemental Information. Provide the explanations required by Part I, lines 3, 4d, 5h, 6b, and 7, a	as applicable.
	Also provide any other additional information.	
	PUDIANAMION OF COMPRESSED BINANCIAL ATC.	
DINE 6	- EXPLANATION OF GOVERNMENT FINANCIAL AID:	
ROOTEL	SCHOOL IS A PUBLIC CHARTER SCHOOL PRINCIPALLY FUNDED	BY FEDERAL
MONIES		

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30 16210504 135992 213-11828000 2017.05050 ROOTED SCHOOL

732062 10-06-17	Schedule E (Form 990 or 990-EZ) 2017	
	31	
16210504 135992 213-11828000	2017.05050 ROOTED SCHOOL	213-18V1

Name of the organization Employer identification number 47-1901769 FORM 990, PART VI, SECTION B, LINE 11B: Configuration A COPY OF THE FORM 990 IS PRESENTED TO THE BOARD FOR COMMENTS AND APPROVAL Aut PRIOR TO FILING THE FORM. Aut PRIOR TO FILING THE FORM. Make and the second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second	SCHEDULE O (Form 990 or 990-EZ) Department of the Treasury Internal Revenue Service	Supplemental Information to Form 990 or 99 Complete to provide information for responses to specific questions o Form 990 responses to provide any additional information. Match to Form 990 or 990-EZ Go to www.is.gov/Form990 for the latest information.		Form 8 (Rev. Jan Department
FORM \$90, PART VI, SECTION B, LINE 11B: Nome A COPY OF THE FORM \$90 IS PRESENTED TO THE BOARD FOR COMMENTS AND APPROVAL Aut PRIOR TO FILING THE FORM. Aut FORM \$90, PART VI, SECTION B, LINE 12C: THE THE OFFICERS, DIRECTORS, AND TRUSTEES ALL SIGN THE CONFLICT OF INTEREST Point POLICY ON AN ANNUAL BASIS. THE ORGANIZATION ALSO HOLDS MONTHLY BOARD Nome MEETINGS WHERE THE BOARD DISCUSS OPPORTUNITIES AND POTENTIAL CONFLICTS OF Fine INTEREST. IF A CONFLICT OF INTEREST WERE TO ARISE, THE BOARD CHAIR WOULD Esc DIRECT A COMMITTEE OR THE GOVERNING BOARD TO INVESTIGATE THE NATURE OF THE Form CONFLICT OF INTEREST. FURTHERMORE, THE BOARD CHAIR WOULD THEN DELEGATE THE Form TASK TO THE GOVERNING BOARD OR COMMITTEE TO RESEARCH ALL FEASIBLE Form	Name of the organization			Internal New
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	ALTERNATIVES	TO EVALUATE IN LIEU OF THE POTENTIAL CONFLI	CT OF INTEREST.	• The b

FORM 990, PART VI, SECTION B, LINE 15:

THE BOARD REVIEWS AND APPROVES THE COMPENSATION AMOUNTS FOR ROOTED'S CEO

BASED ON THE MARKET RATE FOR THE POSITION. THE CEO DETERMINES THE

COMPENSATION OF OTHER KEY EMPLOYEES OF THE ORGANIZATION IN ACCORDANCE WITH THE MARKET RATE FOR THEIR POSITION.

THE	DOG	CUMENTS	ARE	READILY	AVAILABLE	TO THE	PUBLIC	UPON	REQUEST.		
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0.01											
	ior Da	nanunrk Da	turtion A	of biotics, say	the Instantions for E	orm 990 or 6	90 E7		chadula O (For	m 990 or 990 s	20 /20 17
			duction A	ict Notice, see	the Instructions for F	orm 990 or 9	90-EZ.	8	chedule O (For	m 990 or 990-E	Z) (2017
LHA 1			duction A	act Notice, see	the Instructions for F	orm 990 or 9	990-EZ.	8	ichedule O (For	m 990 or 990-E	Z) (201 7

Form 8	000 uary 2017)	Application			Extension of Time T ization Return	o File	Contraction of the second	1.110
					ication for each return.		OMB No. 1	545-1709
Department of Internal Neve	of the Trazary nam Service	► Informat	-		instructions is at www.lra.gov/form	8868 .		
					6-month automatic extension of tim			
		-			Transfers Associated With Certain F			
					format (see instructions). For more		the electronic	
ning of th	is form, visit w	ww.irs.gowenie, cick	n Chartles & Non-Profit	ts, an	d click on e-file for Charities and Nor	P-Pronts.	8	
Automa	tic 6-Mont	th Extension of 1	me. Only submit or	rigina	al (no copies needed).			
					(including 1120-C filers), partnership	s, REMIC	s, and trusts	
must use	Form 7004 to	request an extension	f time to file income tax	x retur	ns.			
						Enter fik	er's identifying nu	mber
Type or	Name of ex	empt organization or	her filer, see instruction	actions. E			Employer identification number (
print								
File by the	ROOTED SCHOOL						47-19017	
due dale for filing your			no. If a P.O. box, see in:	struct	bans.	Social se	curity number (SSI	4)
return. See		T. CHARLES	AVENUE 1 ZIP code. For a foreign	-	terre and industriant			
Con Decorde		LEANS, LA	70115	n 200	ress, see instructions.			
Enter the				epara	te application for each return)			0 1
Applicati	on		Ret	turn	Application			Beturn
Is For			Co	ode	Is For			Code
Form 990	or Form 990-8	<u>-</u>	0	01	Form 990-T (corporation)			07
Form 990	-BL		0	02	Form 1041-A			08
	0 (individual)			03	Form 4720 (other than individual)			09
Form 990				04	Form 5227			10
		or 408(a) trust)		05	Form 6069			11
Form 990	T (trust other		IZATION	06	Form 8870			12
. The ho	oly we in the			AVE	ENUE - NEW ORLEANS	T.A	70115	
		04-208-6571	orr charboo		Fax No.	,		
			r place of business in th	the Un	ited States, check this box			
						this is fo	r the whole group,	check this
box 🕨 [. If it is for	part of the group, ch			ch a list with the names and EINs of	al memb	ers the extension b	s for.
1 Irec	quest an autor	natic 6-month extensi	n of time until	MAY	(15, 2019 , to file	the exen	npt organization ret	um
for t	the organizatio	on named above. The	stension is for the organ	nizatio	on's return for:			
	_							
► L		vearor	2017					
		eginning JUL	than 12 months, check		dending JUN 30, 2018	Final retur	-	
		ered in line 1 is for les accounting period	man 12 months, check	K reas		-inal retur	n	
			0.PE 990.T 4720 or 6	6069	enter the tentative tax, less any			
		dits. See instructions				3a	\$	0.
b ifth	is application	is for Forms 990-PF, 9	0-T, 4720, or 6069, ent	ter any	refundable credits and		-	
esti	mated tax pay	ments made. Include	ny prior year overpaym	nent al	lowed as a credit.	36	\$	0.
			a. Include your paymen					
by u	sing EFTPS (Bectronic Federal Tax	ayment System). See I	instru	ctions.	3c	\$	0.
		g to make an electron	funds withdrawal (dire	ect del	bit) with this Form 8868, see Form 8	453-EO a	nd Form 8879-EO f	or payment
instruction		Carl Carlos		_				
LHA F	or Privacy Act	t and Paperwork Rec	ction Act Notice, see	instru	uctions.		Form 8968 (F	ev. 1-2017
		MAIL TO:	DEPARTMENT O	OF 1	THE TREASURY			
					JE SERVICE CENTER			
			OGDEN, UT 84	1201	L-0045			

723841 04-01-17

32.1 16210504 135992 213-11828000 2017.05050 ROOTED SCHOOL 213-18V1



ROOTED SCHOOL 4238 St Charles Ave NEW ORLEANS, LA 70130

ROOTED SCHOOL:

Enclosed is the organization's 2018 Exempt Organization return.

Specific filing instructions are as follows.

FORM 990 RETURN:

This return has qualified for electronic filing. After you have reviewed the return for completeness and accuracy, please sign, date and return Form 8879-EO to our office. We will transmit the return electronically to the IRS and no further action is required. Please return Form 8879-EO to us as soon as possible, but no later than by May 15, 2020 the filing deadline.

When mailing is necessary, we recommend that you use certified mail with postmarked receipts for proof of timely filing.

Be sure to review the returns prior to signing as you have final responsibility for all information included in the returns. If there is anything on the return you do not understand, we would be glad to answer your questions.

Copies of each return are provided and should be retained for your files. Based on IRS guidance, we generally recommend that you keep supporting documentation for a minimum of seven years; and that you keep copies of the tax returns, and records that support basis for items in the tax return, indefinitely.

We value our relationship with you and thank you for your trust and confidence in allowing us to serve you. If you have any questions regarding the returns or other services that we can assist you with, please do not hesitate to contact us. Some of our best clients come through referrals from existing clients. If you know of anyone who could benefit from our assistance, we would be pleased to speak to him or her.

Sincerely,

CliftonLarsonAllen LLP

8879-EO	IRS e-file Signature Authorization for an Exempt Organization	H	OMB No. 1525-1878
Fam COTO LO	For calendar year 2016, or facel year beginning JUL 1 , 2018, and ending JUN 30 , 2	19	0040
Department of the Treasury Internal Revenue Service	 Do not send to the IR8. Keep for your records. Go to www.irs.gov/Form8879EO for the latest information. 	_	2018
Name of exempt organizatio		Employer ide	entification number
ROOTED SCHOOL		47-19	01769
1 1 col 1 10			
	ISON		
Name and title of officer JONATHAN JOHN	ISON		

1a Form 990 check here 🕨 🗶 b Total revenue, If any (Form 990, Part VIII, column (A), line 12)	1b	2,000,399.
2a Form 990-EZ check here Total revenue, if any (Form 990-EZ, line 9)	2b	200
3a Form 1120-POL check here 🕨 🔲 b Total tax (Form 1120-POL, line 22)		
4a Form 990-PF check here 🕨 📄 b Tax based on Investment Income (Form 990-PF, Part VI, line 5)	4b	
5a Form 8868 check here b Dalance Due (Form 8868, line 3c)	6b	

Part II Declaration and Signature Authorization of Officer

Under penalties of peruy, I decize that I am an officer of the above organization and that I have examined a copy of the organization's 2018 electronic returns and accompanying schedules and statements and to the beta for eny howeledge and belief, they are true, correct, and ocomplete. I hutther decizer that the amount in Part I above is the amount shown on the copy of the organization's electronic return. I ensure the amount is performed as expressions and the state of the synaphical performance and the second performance and the state of the synaphical performance and the second performance and the synaphical performance and the second performance and the synaphical performance and the synaphical performance and the synaphical performance and the synaphical performance and the synaphical performance and the synaphical performance and the synaphical performance and the synaphical performance and the synaphical performance and the synaphical performance and the synaphical performance and the synaphical performance and the synaphical performance and the synaphical performance and the synaphical performance and the synaphical performance and the synaphical performance and the synaphical performance and the synaphical performance and the synaphical performance and the synaphical performance and the synaphical performance and the synaphical performance and the synaphical performance and the synaphical performance and the synaphical performance and the synaphical performance and the synaphical performance and the synaphical performance and the synaphical performance and the synaphical performance and the synaphical performance and the synaphical performance and the synaphical performance and the synaphical performance and the synaphical performance and the synaphical performance and the synaphical performance and the synaphical performance and the synaphical performance and the synaphical performance and the synaphical performance and the synaphical performance and the synaphical performance and the synaphical perfo

X authorize CLIFTONLARSONALLEN LLP	to enter my PIN 22100
ERO firm name	Enter five numbers, bui do not enter all zeros
as my signature on the organization's tax year 2018 electronically filed return. If I have in is being filed with a state agency()es) regulating charities as part of the IRS Fed/State pro	
enter my PIN on the return's disclosure consent screen.	gran, raso autorize de alorementoreo eno to
As an officer of the organization, I will enter my PIN as my signature on the organization	
indicated within this return that a copy of the return is being filed with a state agency()es program, I will enter my PIN on the return's disciosure consent screen.) regulating charities as part of the IRS Fed/State
program, I will enter my PIN on the return's disclosure consent screen.) regulating charities as part of the IRS Fed/State Date
program, I will enter my PIN on the return's disclosure consent screen.	

I certify that the above numeric entry is my PBI, which is my signature on the 2018 electronically filed return for the organization indicated above. I confirm that I an submitting this return in accordance with the requirements of Pub. 4160, Modemized e-File (MeF) information for Authorized IRS e-III: Providers for Business Returns.

ERO Must	Retain This Form - See Instructions	
Do Not Submit This	Form to the IRS Unless Requested To Do So	
LHA For Paperwork Reduction Act Notice, see Instructi	ons.	Form 8879-EO (2018)
822051 10-26-18		

Caution: Forms printed from within Adobe Acrobat products may not meet IRS or state taxing agency specifications. When using Acrobat, select the "Actual Size" in the Adobe "Frint" dialog.

CLIFTONLARSONALLEN LLP 2210 EAST ROUTE 66 GLENDORA, CA 91740

CLIENT'S COPY

ROOTED SCHOOL 4238 ST CHARLES AVE NEW ORLEANS, LA 70130

II...III.....II.II.II.II.I

14040416 131839 213-118280-00

2018.05080 ROOTED SCHOOL

orm	99	0	Return of Organ Under section 601(c), 627, or 494	nization Exempt F			
_				ecurity numbers on this form a			Open to Public
	Neverse	Service		Form990 for Instructions and			Inspection
F	or the 2	018 calend	ar year, or tax year beginning J	UL 1, 2018 and e	ending J	UN 30, 201	9
-	nach M pilozabilez	C Name of	organization			D Employer Ident	tification number
	Address	ROOT	ED SCHOOL			1 1000	10000000
_	itare change Initial return		usiness as				1901769
		4238	and street (or P.O. box if mail is not de ST CHARLES AVE		Room'suite	E Telephone num 504	-208-6571
_	Agranded		own, state or province, country, and	ZIP or foreign postal code		G Gross receipts S	2,000,399
-	Applica-		ORLEANS, LA 70130 nd address of principal officer: JON	ATHAN JOHNSON		H(a) is this a group	tes? Yes X No
-	pending		AS C ABOVE	ATTIAN CONSON			included" Yes No
Ta	w-exem			(insert no.) 4947(a)(1) or	r 527		a list. (see instructions)
w	ebsite:	ROOT	EDSCHOOL.ORG			H(c) Group exempt	
Fo	rm of or	ganization:	X Corporation Trust A	ssociation 🚺 Other 🕨	L Year	of formation: 2014	M State of legal domicile: L
Pai		ummary					
8			e the organization's mission or mos L PATHWAYS TO FINA		IST T	O PROVIDE	OUR STUDENTS
run no			x 🕨 🛄 If the organization disco		ed of more	than 25% of its net a	
E Ser			ing members of the governing body				3
0	4 Nu	mber of Ind	ependent voting members of the go	verning body (Part VI, line 1b)			4
8			of individuals employed in calendar				6 1
ž.			of volunteers (estimate if necessary)				6 7a 0
Pe l			d business revenue from Part VIII, co				
+	D No	t unrelated	business taxable income from Form	990-T. Inc 38		Prior Year	Current Year
	8 Co	ntributions	and grants (Part VIII, line 1h)			1,504,156	
2			ce revenue (Part VIII, line 2g)			0	
2			come (Part VIII, column (A), lines 3, 4			0	
æ			(Part VIII, column (A), lines 5, 6d, 8d			541	. 4,533
_	12 To	tal revenue	add lines 8 through 11 (must equa	Part VIII. column (A). line 12)		1,504,697	
			nliar amounts paid (Part IX, column			0	
			to or for members (Part IX, column (0	
8			compensation, employee benefits (731,508	
5	16a Pr	ofessional fu	undraising fees (Part IX, column (A),	ine 11e)	1	0	. 0
8			ng expenses (Part IX, column (D), lin			691,395	. 957.078
-			es (Part IX, column (A), lines 11a-11d s. Add lines 13-17 (must equal Part l			1,422,903	
			expenses. Subtract line 18 from line			81,794	
5					Ber	ainning of Current Yea	
a 24	20 To	tal assets (F	art X, line 16)			225,603	
4	21 To	tal labilities	(Part X, line 26)			25,280	. 105,422
Ę.			und balances. Subtract line 21 from	Inc 20		200,323	. 143,561
_	_	Signature		AND ALCONTRACTORING AND A	1922		
			declare that I have examined this return				my knowledge and belief, it is
ac, 1	offect, a	una compiete.	Declaration of preparer (other than offic	ery is based on all information of who	cn preparer	nas any knowledge.	
Ign		Signature	of officer			Date	
ere		JONA	THAN JOHNSON, CEO				
-	P	rint/Type pres		Preparer's signature		ate Ged	PTIN
aid			MULLEN	WADE MCMULLEN	0		P00541671
repa	rer Fi	rm's name	LIFTONLARSONALL	EN LLP		Firm's EIN #	
se (aly Fi	rm's address	2210 EAST ROUTE	66			
			GLENDORA, CA 917				626) 857-7300

May the IRS discuss this return with the preparer shown above? (see instructions)

Phone ns. (626) 857-7300 X Yes No Form 990 (2018)

Pa	art III Statement of Program Service Accomplishments
	Check If Schedule O contains a response or note to any line in this Part II
1	Briefly describe the organization's mission:
	WE EXIST TO PROVIDE OUR STUDENTS PERSONAL PATHWAYS TO FINANCIAL
	FREEDOM.
	TREEDOR.
2	Did the organization undertake any significant program services during the year which were not listed on the
	prior Form 990 or 990-EZ? Yes X N
	If "Yes," describe these new services on Schedule O.
3	Did the organization cease conducting, or make significant changes in how it conducts, any program services?
	If "Yes," describe these changes on Schedule O.
4	Describe the organization's program service accomplishments for each of its three largest program services, as measured by expenses.
	Section 501(c)(3) and 501(c)(4) organizations are required to report the amount of grants and allocations to others, the total expenses, and
	revenue. If any, for each program service reported.
43	(Code:) (Expenses 1,587,577. Including grants of 5) (Revenue 5 4,533.
	ROOTED SCHOOL EXISTS TO PROVIDE PERSONAL PATHWAYS TO FINANCIAL FREEDOM.
	ROOTED SCHOOL IS ORGANIZED TO MANAGE AND OPERATE A PUBLIC CHARTER HIGH
	SCHOOL FOR 9 -12TH GRADE. DURING THE YEAR ENDED JUNE 30, 2019. THE
	ORGANIZATION SERVED APPROXIMATELY 96 STUDENTS AND PROVIDED 185 DAYS OF
	INSTRUCTION.
4h	(Code:) (Expenses 5 Including grades of 5) (Revenue 5
-	
4c	(Code:) (Expenses S Including grants of S) (Newman S)
4d	Other program services (Describe in Schedule O.)
	(Expenses 5 Including grants of 5) (Nerveux 5)
4d	(Expenses 5) (Newwess 5) Total program service expenses I► 1,587,577.
40	(Expenses 5 Including grants of 5) (Nerveux 5)

Par	t IV Checklist of Required Schedules			
			Yes	No
1	is the organization described in section 501(c)(3) or 4947(a)(1) (other than a private foundation)?			
	If "Yes," complete Schedule A	1	х	
2	is the organization required to complete Schedule B. Schedule of Contributors?	2	X	-
	Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for	-		\vdash
3		3		X
	public office? If "Yes," complete Schedule C, Part I	3	-	1
4	Section 601(c)(3) organizations. Did the organization engage in lobbying activities, or have a section 501(h) election in effect	100		
	during the tax year? If "Yes," complete Schedule C, Part II	4	-	X
6	is the organization a section 501(c)(4), 501(c)(5), or 501(c)(6) organization that receives membership dues, assessments, or			
	similar amounts as defined in Revenue Procedure 98-19? # "Yes," complete Schedule C, Part III	6		X
6	Did the organization maintain any donor advised funds or any similar funds or accounts for which donors have the right to		1. S.	
	provide advice on the distribution or investment of amounts in such funds or accounts? If "Yes," complete Schedule D, Part I	6		X
7	Did the organization receive or hold a conservation easement, including easements to preserve open space,		6.13	
	the environment, historic land areas, or historic structures? If "Yes," complete Schedule D, Part II	7	3-3	X
8	Did the organization maintain collections of works of art, historical beasures, or other similar assets? If "Yes," complete			
	Schedule D. Part III	8		X
9	Did the organization report an amount in Part X, line 21, for escrow or custodial account liability, serve as a custodian for	-		
-	amounts not listed in Part X: or provide credit counseling, debt management, credit repair, or debt negotiation services?			
	amounts not isted in Part X, or provide credit counseling, debt management, credit repair, or debt negotabon services: If "Yes," complete Schedule D. Part IV	9		x
		,		1
10	Did the organization, directly or through a related organization, hold assets in temporarily restricted endowments, permanent			x
	endowments, or quasi-endowments? # 'Yes,' complete Schedule D, Part V	10		1
11	If the organization's answer to any of the following questions is "Yes," then complete Schedule D, Parts VI, VII, DI, or X			
	as applicable.		1000	
a	Did the organization report an amount for land, buildings, and equipment in Part X, line 10? If "Yes," complete Schedule D,			
	Part VI	11a		X
b	Did the organization report an amount for investments - other securities in Part X, line 12 that is 5% or more of its total			
	assets reported in Part X, line 16? If "Yes," complete Schedule D, Part VII	11b		X
с	Did the organization report an amount for investments - program related in Part X, line 18 that is 5% or more of its total	1000	1.00	
	assets reported in Part X, line 16? If "Yes," complete Schedule D, Part VII	110		X
d	Did the organization report an amount for other assets in Part X, line 15 that is 5% or more of its total assets reported in		1 A	
	Part X, Ine 16? If "Yes," complete Schedule D, Part IX	11d	5	X
	Did the organization report an amount for other liabilities in Part X, line 25? If "Yes," complete Schedule D, Part X	11e		X
	Did the organization's separate or consolidated financial statements for the tax year include a footnote that addresses			-
	the organization's liability for uncertain tax positions under FIN 48 (ASC 740)? If "Yes," complete Schedule D, Part X	111	x	
				+
123	Did the organization obtain separate, independent audited financial statements for the tax year? If "Yes," complete		x	
	Schedule D, Parts XI and XII	12a	-	-
ь	Was the organization included in consolidated, independent audited financial statements for the tax year?		1	
	If "Yes," and If the organization answered "No" to line 72a, then completing Schedule D, Parts XI and XII is optional	12b		X
13	is the organization a school described in section 170(b)(1)(A)(I)? If "Yes," complete Schedule E	13	x	
14a	Did the organization maintain an office, employees, or agents outside of the United States?	14a		X
b	Did the organization have aggregate revenues or expenses of more than \$10,000 from grantmaking, fundraising, business,			
	Investment, and program service activities outside the United States, or aggregate foreign Investments valued at \$100,000			
	or more? If "Yes," complete Schedule F, Parts I and IV	14b	1.10	X
15	Did the organization report on Part IX, column (A), line 3, more than \$5,000 of grants or other assistance to or for any			
	foreign organization? If "Yes," complete Schedule F, Parts II and IV	15	3	X
16	Did the organization report on Part IX, column (A), line 3, more than \$5,000 of aggregate grants or other assistance to			
	or for foreign individuals? If "Yes," complete Schedule F, Parts III and IV	16		X
	Did the organization report a total of more than \$15,000 of expenses for professional fundraising services on Part IX,	10		-
**		17		x
	column (A), lines 6 and 11e? If "Yes," complete Schedule G, Part I	17		-
18	Did the organization report more than \$15,000 total of fundraising event gross income and contributions on Part VIII, lines			-
12	1c and 8a? If 'Yes,' complete Schedule G, Part II	18	-	X
19	Did the organization report more than \$15,000 of gross income from gaming activities on Part VIII, line 9a? # "yes,"			
	complete Schedule G, Part III	19	-	X
20a	Did the organization operate one or more hospital facilities? # "Yes," complete Schedule H	20a	1	X
b	If "Yes" to line 20a, did the organization attach a copy of its audited financial statements to this return?	20b	1	
21	Did the organization report more than \$5,000 of grants or other assistance to any domestic organization or			
	domestic government on Part IX. column (A), line 1? If "Yes." complete Schedule I. Parts I and II	21	1.00	X
3200	12-33-18	Form	990	(201
	3			

Par	990 (2018) ROOTED SCHOOL 47-1901 TIV Checklist of Required Schedules (continued)			-0.5
	oncomist of nedarical continued)			
		_	Yes	N
22	Did the organization report more than \$5,000 of grants or other assistance to or for domestic individuals on			
	Part IX, column (A), line 2? # *Yes, * complete Schedule I, Parts I and III	22		X
23	Did the organization answer "Yes" to Part VII, Section A, line 3, 4, or 5 about compensation of the organization's current			
	and former officers, directors, trustees, key employees, and highest compensated employees? If "Yes," complete			
	Schedule J	23		X
24.3	Did the organization have a tax-exempt bond issue with an outstanding principal amount of more than \$100,000 as of the			
		1		
	last day of the year, that was issued after December 31, 2002? If "Yes," answer lines 24b through 24d and complete	243		X
	Schedule K. If "No," go to line 25a	_	-	-
	Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception?	24b	<u> </u>	-
c	Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease			
	any tax-exempt bonds?	24c		L_
d	Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year?	24d		
26 a	Section 601(c)(3), 601(c)(4), and 601(c)(29) organizations. Did the organization engage in an excess benefit			Ľ.,
	transaction with a disqualified person during the year? If "Yes," complete Schedule L, Part I	25a		2
b	is the organization aware that it engaged in an excess benefit transaction with a disqualified person in a prior year, and			
	that the transaction has not been reported on any of the organization's prior Forms 990 or 990-EZ? If "Yes," complete	1		
		25b		2
-	Schedule L, Part I	200	-	1
20	Did the organization report any amount on Part X, line 5, 6, or 22 for receivables from or payables to any current or	1		
	former officers, directors, trustees, key employees, highest compensated employees, or disqualified persons? #"Yes,"	1		
	complete Schedule L, Part II	26		2
27	Did the organization provide a grant or other assistance to an officer, director, trustee, key employee, substantial			
	contributor or employee thereof, a grant selection committee member, or to a 35% controlled entity or family member			
	of any of these persons? # "Yes," complete Schedule L, Part W	27		2
28	Was the organization a party to a business transaction with one of the following parties (see Schedule L, Part IV	-		
	instructions for applicable filing thresholds, conditions, and exceptions):			
-	A current or former officer, director, bustee, or key employee? If "Yes," complete Schedule L, Part IV	28a		2
1	A current of former onice, unector, unstee, or key employee: in "yes," complete schedule L, Part IV			X
	A family member of a current or former officer, director, trustee, or key employee? If "Yes," complete Schedule L, Part IV	28b	<u> </u>	-
c	An entity of which a current or former officer, director, trustee, or key employee (or a family member thereof) was an officer,	1100		
	director, trustee, or direct or indirect owner? # "Yes," complete Schedule L, Part IV	28c		2
29	Did the organization receive more than \$25,000 in non-cash contributions? If "Yes," complete Schedule M	29		X
30	Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation			
	contributions? If "Yes," complete Schedule M	30		X
31	Did the organization liquidate, terminate, or dissolve and cease operations?			
	If "Yes," complete Schedule H, Part I	31		X
-	Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? If "yes," complete			-
02		00		X
	Schedule N, Part II	32	-	-
33	Did the organization own 100% of an entity disregarded as separate from the organization under Regulations			
	sections 301.7701-2 and 301.7701-3? If "Yes," complete Schedule R, Part I	33		Z
34	Was the organization related to any tax-exempt or taxable entity? If "Yes," complete Schedule R, Part II, III, or IV, and	1		
	Part V, Ilor 1	34		2
35 a	Did the organization have a controlled entity within the meaning of section 512(b)(13)?	36a		Z
b	If "Yes" to line 35a, did the organization receive any payment from or engage in any transaction with a controlled entity			
	within the meaning of section 512(b)(18)? If "Yes," complete Schedule R, Part V, line 2	35b		
36	Section 601(c)(3) organizations. Did the organization make any transfers to an exempt non-charitable related organization?			
30		36		2
-	If "Yes," complete Schedule R, Part V, line 2	30	-	1
37	Did the organization conduct more than 5% of its activities through an entity that is not a related organization			
	and that is treated as a partnership for federal income tax purposes? If "Yes," complete Schedule R, Part VI	37	-	X
38	Did the organization complete Schedule O and provide explanations in Schedule O for Part VI, lines 11b and 19?		100	
_	Note, All Form 990 filers are required to complete Schedule O	38	X	
Par	tV Statements Regarding Other IRS Filings and Tax Compliance			
	Check If Schedule O contains a response or note to any line in this Part V			
			Yes	N
4-	Enter the number reported in Box 3 of Form 1096. Enter -0- If not applicable	2	123	1
		4		
C	Did the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming			
_	(gambling) winnings to prize winners?	10	X	1
135004	10-31-10	Form	990	(201
	4			

Form 990 (2018)	ROOTED SCHOOL		Page 7
Part VII Compensati	ion of Officers, Directors, Trustees, Key E	mployees, Highest Compensated	22422
Employees,	and Independent Contractors		

	Check If Schedule O contains a response or note to any line in this Part VI		
Section A.	Officers, Directors, Trustees, Key Employees, and Highest Compensated Er	mployees	

1a Complete this table for all persons required to be listed. Report compensation for the calendar year ending with or within the organization's tax year. Ust all of the organization's current officers, directors, trustees (whether individuals or organizations), regardless of amount of compensation.
 Enter - On columns (D), (B), and (F) if no compensation was paid.
 Ust all of the organization's current key employees, if any. See instructions for definition of 'key employee."
 Ust all of the organization's incurrent key employees, if any. See instructions for definition of 'key employee.
 Ust all of the organization's three entrent highest compensated employees (other than an officer, director, brustation or key employee) who received report-ble compensation (Bos of FORM W2 and/or Bos). 7 of Form 1994/MSC) of more than \$100,000 hom the organization and any related organizations.

• List all of the organization's former officers, key employees, and highest compensated employees who received more than \$100,000 of reportable compensation from the organization and any related organizations.

• List all of the organization's former directors or trustees that received, in the capacity as a former director or trustee of the organization, more than \$10,000 of reportable compensation from the organization and any related organizations.

List persons in the following order: individual truetes or directors in the function of function of products of the function of the function of the function of the function of the function of the function of the function of the function of the function of the function of the function of the function of the function of the function of the function of the function of the function of the function of the function of the function of the function of the function of the function of the function of the function of the function of the function of the function of the function of the function of the function of the function of the function of the function of the function of the function of the function of the function of the function of the function of the function of the function of the function of the function of the function of the function of the function of the function of the function of the function of the function of the function of the function of the function of the function of the function of the function of the function of the function of the function of the function of the function of the function of the function of the function of the function of the function of the function of the function of the function of the function of the function of the function of the function of the function of the function of the function of the function of the function of the function of the function of the function of the function of the function of the function of the function of the function of the function of the function of the function of the function of the function of the function of the function of the function of the function of the function of the function of the function of the function of the function of the function of the function of the function of the function of the function of the function of the function of the function of the function of the function of the function of the function of the function of the function of the function of the function of the function of the function of the function of the function o

(A) Name and Title	(B) Average hours per week	(C) Position (do not check more flam one box, unleas person is both an officer and a director frustee)					an	(D) Reportable compensation from	(E) Reportable compensation from related	(F) Estimated amount of other
	week to the term of the term of the term of the term of the term of the term of the term of the term of the term of the term of the term of the term of the term of the term of the term of the term of the term of the term of the term of the term of the term of the term of the term of the term of the term of the term of the term of the term of the term of the term of the term of the term of the term of the term of the term of the term of the term of the term of the term of the term of the term of the term of the term of term of the term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term of term o	the organization	organizations (W-2/1099-MISC)	compensation from the organization and related organizations						
(1) MATT CANDLER BOARD CHAIR	1.00	x		x				0.	0.	0.
(2) TRAVIS CEASE BOARD MEMBER	1.00	x				0.05		0.	0.	0.
(3) RESAMA DURAND SECRETARY	1.00	x		x				0.	0.	0.
(4) RYLE FINRE TREASURER	1.00	x		x				0.	0.	0.
(5) ERANDIN CAMPBELL BOARD NEMBER	1.00	x						0.	0.	0.
(6) TONY ZANDER.5 BOARD MEMBER	1.00	x						0.	0.	0.
(7) JOHN ALFORD BOARD MEMBER	1.00	x						0.	0.	0.
(8) CERARD WILLIS FARENT LIAISON	1.00	x						0.	0.	0.
(9) JONATHAN JOHNSON CEO	80.00			x				114,031.	0.	9,159.
	_									
				-						
832007 12-31-18					_					Form 990 (2018)

Name and title	(B) Average hours per week ()Ist any		not c	(C Position	c) Ition more to tector	tan o		(D) Reportable compensation from the	(E) Reportable compensation from related organizations	(F) Estimated amount of other compensation	
	hours for related organizations below line)	inchAcual test or choice	institutional trust on	Officer	to y un please	Nytet orrpmatic orphyse	Form	organization (W-2/1099-MISC)	(W-2/1099-MISC)	from the organization and related organizations	
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b Sub-total)	-	114,031.	0.	9,159	
c Total from continuation sheets to Pa d Total (add lines 1b and 1c)	art VII, Section A					!		0.	0.	9,159	
		-	liste								
Total number of individuals (including compensation from the organization		~		0 20	iove)	who	rec	eived more than \$100,	000 of reportable	Yes N	
compensation from the organization Did the organization list any former of	Ficer, director, or th	uste								Yes N	
compensation from the organization Did the organization list any former of line 1a? if "Yes," complete Schedule J	Micer, director, or tr	uster	e, ke	y en	npioy	ee,	or hi	ighest compensated en	nployee on	Yes N	
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	tt V Statements Regarding Other IRS Filings and Tax Compliance (continued)			Yes	No
2a	Enter the number of employees reported on Form W-3, Transmittal of Wage and Tax Statements,			1.1.1.1.1	
	filed for the calendar year ending with or within the year covered by this return	2a 15			
b	If at least one is reported on line 2a, did the organization file all required federal employment tax returns?	!	2b	X	
	Note. If the sum of lines 1a and 2a is greater than 250, you may be required to e-file (see instructions)				
	Did the organization have unrelated business gross income of \$1,000 or more during the year?		3a		X
b	If "Yes," has it flied a Form 990-T for this year? If "No" to line 3b, provide an explanation in Schedule O		3b		
4a	At any time during the calendar year, did the organization have an interest in, or a signature or other auth	hority over, a			2.7%
	financial account in a foreign country (such as a bank account, securities account, or other financial account	ount)?	4a	2	X
b	If "Yes," enter the name of the foreign country:				
	See instructions for filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Acco	ounts (FBAR).		100	
5a	Was the organization a party to a prohibited tax shelter transaction at any time during the tax year?		63		X
	Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction	m?	6b		X
c	If "Yes" to line 5a or 5b, did the organization file Form 8886-T?		6c		
5a	Does the organization have annual gross receipts that are normally greater than \$100,000, and did the o	rganization solicit			222
	any contributions that were not tax deductible as charitable contributions?		6a		X
b	If "Yes," did the organization include with every solicitation an express statement that such contributions	s or gifts			
	were not tax deductible?		6b	-	
	Organizations that may receive deductible contributions under section 170(c).				
	Did the organization receive a payment in excess of \$75 made partly as a contribution and partly for goods and service	es provided to the payor?	73	-	X
	If "Yes," did the organization notify the donor of the value of the goods or services provided?		7b		
c	Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was r	required			2.22
	to file Form 8282?		7c	-	X
d	If "Yes," Indicate the number of Forms 8282 fied during the year7	7d			
e	Did the organization receive any funds, directly or indirectly, to pay premiums on a personal benefit control	ract?	7e		X
1	Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract	•	71		X
9	If the organization received a contribution of qualified intellectual property, did the organization file Form	8899 as required?	79		
h	If the organization received a contribution of cars, boats, airpianes, or other vehicles, did the organization	n file a Form 1098-C?	7h		
в	Sponsoring organizations maintaining donor advised funds. Did a donor advised fund maintained by	the			
	sponsoring organization have excess business holdings at any time during the year?		8		
9	Sponsoring organizations maintaining donor advised funds.				
a	Did the sponsoring organization make any taxable distributions under section 4966?		90	_	
b	Did the sponsoring organization make a distribution to a donor, donor advisor, or related person?		9b		
	Section 601(c)(7) organizations. Enter:	1			
а		0a	-		
		0b	-		
1	Section 601(c)(12) organizations. Enter:	T.			
a	Gross income from members or shareholders1	1a	-		
b	Gross income from other sources (Do not net amounts due or paid to other sources against	7.8			
	amounts due or received from them.)	1b		1.00	
_	Section 4947(a)(1) non-exempt charitable trusts. Is the organization filing Form 990 in lieu of Form 10	412	12a		
	If "Yes," enter the amount of tax-exempt interest received or accrued during the year	2b	-		
	Section 601(c)(29) qualified nonprofit health insurance issuers.			1. 10	
a	Is the organization licensed to issue qualified health plans in more than one state?		13a		
	Note. See the instructions for additional information the organization must report on Schedule O.				
b	Enter the amount of reserves the organization is required to maintain by the states in which the	1			
	organization is received to inside quantical plans	3b	-		
		3c			-
4a	Did the organization receive any payments for indoor tanning services during the tax year?		14a	-	X
	If "Yes," has It filed a Form 720 to report these payments? If "No," provide an explanation in Schedule O		14b	-	
5	is the organization subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remuneration	on or	1000		
	excess parachute payment(s) during the year?		16	-	X
	If "Yes," see instructions and file Form 4720, Schedule N.				
5	Is the organization an educational institution subject to the section 4968 excise tax on net investment in	come?	16	-	X
	If "Yes," complete Form 4720, Schedule O.				
			Form	990	(2018)
-	12-33-18				

	to line 8a, 8b, or 10b below, describe the circumstances, processes, or changes in Schedule O. See instructions. Check If Schedule O contains a response or note to any line in this Part VI			D
Sec	tion A. Governing Body and Management			
		<u>0 - 1</u>	Yes	1
1a	Enter the number of voting members of the governing body at the end of the tax year1a1a1a			Г
	If there are material differences in voting rights among members of the governing body, or if the governing	2		
	body delegated broad authority to an executive committee or similar committee, explain in Schedule 0.			
b	Enter the number of voting members included in line 1a, above, who are independent 1b 8			
2	Did any officer, director, trustee, or key employee have a family relationship or a business relationship with any other			
-	officer, director, trustee, or key employee?	2		
	Did the organization delegate control over management duties customarily performed by or under the direct supervision	-		F
	of officers, directors, or bustees, or key employees to a management company or other person?			
	Did the organization make any significant changes to its governing documents since the prior Form 990 was filed?	4		
	Did the organization become aware during the year of a significant diversion of the organization's assets?	5	-	
		_	-	5
6	Did the organization have members or stockholders?	6		1
73	Did the organization have members, stockholders, or other persons who had the power to elect or appoint one or			Ι.
	more members of the governing body?	73	-	1
b	Are any governance decisions of the organization reserved to (or subject to approval by) members, stockholders, or			
	persons other than the governing body?	7b		2
8	Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following:			
a	The governing body?	8a	X	
b	Each committee with authority to act on behalf of the governing body?	86	X	
9	is there any officer, director, trustee, or key employee listed in Part VII, Section A, who cannot be reached at the	1.1		E
	organization's mailing address? If "Yes," provide the names and addresses in Schedule O	9		
Sec	tion B. Policies (This Section B requests Information about policies not required by the Internal Revenue Code.)			
		93 - Š	Yes	١,
10a	Did the organization have local chapters, branches, or affiliates?	10a		
	If 'Yes,' did the organization have written policies and procedures governing the activities of such chapters, affiliates,			t
-	and branches to ensure their operations are consistent with the organization's exempt purposes?	100		
	Has the organization provided a complete copy of this Form 990 to all members of its governing body before filing the form?	11a	x	+
	Describe in Schedule O the process. If any, used by the organization to review this Form 990.	114		+
			x	E.
	Did the organization have a written conflict of interest policy? If "No," go to line 73	12a	X	⊢
	Were officers, directors, or trustees, and key employees required to disclose annually interests that could give rise to conflicts?	12b	•	⊢
c	Did the organization regularly and consistently monitor and enforce compliance with the policy? If "Yes," describe	1000	1	
	In Schedule O how this was done	12c	X	⊢
	Did the organization have a written whistleblower policy?	13	X	
14	Did the organization have a written document retention and destruction policy?	14		2
16	Did the process for determining compensation of the following persons include a review and approval by independent			
	persons, comparability data, and contemporaneous substantiation of the deliberation and decision?			
a	The organization's CEO, Executive Director, or top management official	16a	X	
b	Other officers or key employees of the organization	16b	X	1
	If "Yes" to line 15a or 15b, describe the process in Schedule O (see instructions).			1
16a	Did the organization invest in, contribute assets to, or participate in a joint venture or similar arrangement with a			
	taxable entity during the year?	16a		
Þ	If "Yes," did the organization follow a written policy or procedure requiring the organization to evaluate its participation			
-	In joint venture arrangements under applicable federal tax jaw, and take steps to safeguard the organization's			
	exempt status with respect to such arrangements?	45%		E
Sec	tion C. Disclosure	100		
	List the states with which a copy of this Form 990 is required to be flied NONE			_
	Section 6104 requires an organization to make its Forms 1023 (1024 or 1024-A if applicable), 990, and 990-T (Section 501(c)(3)s	ontel	malte	hie
10	Section 6104 requires an organization to make its Forms 1028 (1024 or 1024-A if applicable), 990, and 990-1 (Section 50 (jc)(a)s for public inspection. Indicate how you made these available. Check all that apply.	Juny	ar 412	ALC.
-				
19	Describe in Schedule O whether (and if so, how) the organization made its governing documents, conflict of interest policy, and	nnanc	121	
	statements available to the public during the tax year.			
20	State the name, address, and telephone number of the person who possesses the organization's books and records			_
	ORGANIZATION - 504-208-6571			
_	4238 ST. CHARLES AVENUE, NEW ORLEANS, LA 70115			_
	10.73.78		990	

	III Statement of Rever Check If Schedule O cont		or note to any lin	e in this Part VIII			
				(A) Total revenue	(B) Related or exempt function revenue	(C) Unrelated business revenue	(D) Revenue excluded from tax under sections 512 - 514
1	a Federated campaigns	1a					
	b Membership dues						
	c Fundraising events						
	d Related organizations	10	200 224				
	e Government grants (contribut		369,224.				
	f All other contributions, gifts, gran		626,642.				
	similar amounts not included abo 9 Hancash contributions included in Inne		020,042.				
	h Total. Add lines 1a-1f			1,995,866.			
			Business Code				
2	3		and all the second				
	b			2		2	
	c			1			
	d						
1	e		5	9 B		0	
	f All other program service reve	nue					
	g Total. Add lines 2a-2f		•				
3	Investment Income (Including						
	other similar amounts)						
	Income from investment of tax		roceeds				
0	Royalties	(i) Real	(I) Personal				
6	a Gross rents	W NCH	ur Personal	S			
	b Less: rental expenses		5				
	c Rental Income or (loss)						
	d Net rental income or (loss)						
7	a Gross amount from sales of	()) Securities	(II) Other				
	assets other than inventory						
	b Less: cost or other basis						
	and sales expenses	L	2				
	c Gain or (loss)						
	d Net gain or (loss)		····· •				
8	a Gross income from fundraisin including \$						
	contributions reported on line	Ic) Sec					
	Part IV, line 18						
	b Less: direct expenses						
	c Net income or (loss) from fund						
9	a Gross income from gaming ad	tivities. See					
	Part IV, line 19	a					
	b Less: direct expenses						
	c Net income or (loss) from gam			2. S			
10	a Gross sales of Inventory, less						
	and allowances						
	b Less: cost of goods sold						
	 Net income or (loss) from sale Miscellaneous Revenu 		Business Code			_	
11	a SALE OF UNIFORM		900099	4,484.	4,484.		
	DOTHER REVENUE		900099	49.	49.		
	c						
	d All other revenue		3	8		§	
	e Total. Add lines 11a-11d			4,533.			
	Total revenue. See instructions			2,000,399.	4,533.	0.	0.

Sect	ion 501 (c)(3) and 501(c)(4) organizations must compl	ete all columns. All othe	r organizations must com	piete column (A).	
	Check If Schedule O contains a response	e or note to any line in t	his Part IX		X
	not include amounts reported on lines 6b, 8b, 9b, and 10b of Part VIII.	(A) Total expenses	(D) Program service expenses	(C) Management and general expenses	(D) Fundraising expenses
1	Grants and other assistance to domestic organizations				
	and domestic governments. See Part IV, line 21				
2	Grants and other assistance to domestic				
	Individuals. See Part IV, line 22				
3	Grants and other assistance to foreign				
	organizations, foreign governments, and foreign		I		
	Individuals. See Part IV, lines 15 and 16				
4	Benefits paid to or for members				
6	Compensation of current officers, directors,	- contraction			
	trustees, and key employees	120,350.	96,280.	24,070.	
6	Compensation not included above, to disqualified				
	persons (as defined under section 4958(f)(1)) and				
	persons described in section 4958(c)(3)(B)	Contractor and the	2		
7		810,002.	579,433.	58,069.	172,500
8	Pension plan accruals and contributions (include	5	A		2.5
	section 401(k) and 403(b) employer contributions)	25,759.	18,836.	1,590.	5,333
9	Other employee benefits	76,560.	61,089.	8,623.	6,848
10	Payroll taxes	67,412.	48,930.	16,022.	2,460
11					
3	Management				
b		7,657.		7,657.	
c	Accounting	30,740.		30,740.	
	Lobbying				
e	Professional fundraising services. See Part IV, line 17				
	Investment management fees				
9	Other. (If line 11g amount exceeds 10% of line 25.				
-	column (A) amount, list line 11g expenses on Sch 0.)	423,288.	388,742.	30,546.	4,000
12	Advertising and promotion	108.		108.	
13	Office expenses	10,517.		10,517.	
14	Information technology				
15	Royalties				
16	Occupancy	211,689.	211,689.		
17	Travel	45,220.	45,220.		
18	Payments of travel or entertainment expenses		a and a second second		
	for any federal, state, or local public officials				
19	Conferences, conventions, and meetings		5		
20	Interest				
21	Payments to affiliates				
22			0		
23	Insurance	14,370.		14,370.	
24	Other expenses. Itemize expenses not covered				
	above (List miscellaneous expenses in line 74e Hine				
	24e amount exceeds 10% of line 25, column (A) amount, list line 24e expenses on Schedule 0.)				
2	INSTRUCTIONAL MATERIALS	119,235.	119,235.		
ь					
- c					
d			00.200		
	All other expenses	94,254.	18,123.	76,131.	
	Total functional expenses. Add lines 1 through 24e	2,057,161.	1,587,577.	278,443.	191,141
	Joint oosts. Complete this line only if the organization				
	reported in column (B) joint costs from a combined				
	educational campaign and fundraising solicitation.				
	Check here }- If following SCP 98-2 (ASC 938-725)				
	0 10.31.30				Form 990 (201

SCHEDULE A (Form 990 or 990-EZ)	Complete If the orga	arity Status an anization is a section 50 947(a)(1) nonexempt cha Attach to Form 990 or 1	(c)(3) organization iritable trust.		046 Hb. 1345-0047	Schedule A (Form 990 or 990-E7) 2018 RO Part II Support Schedule for O (Complete only If you checked fails to qualify under the tests II
dental Pervense Service		ov/Form990 for Instructi		nformation.	Inspection	Section A. Public Support
Part I Reason for Pul		(All organizations must c		4	r identification number 17-1901769	Calendar year (or fissal year beginning in) 1 Gifts, grants, contributions, and membership fees received. (Do not
he organization is not a private 1 A charch, convention 2 A A school described if 3 A A charch convention 4 A morganization oper- 5 An organization oper- 5 Section 1700(h(1)A) 6 A federal, state, or loo 7 An organization that is 8 A community trust de 9 An agricultural resear or university: 10 An organization that activities related to its Income and unrelated See section 603(a) 11 An organization organ 12 An organization organ 13 An organization organ 14 An organization organ 15 An organization organ 16 An organization organ 17 An organization organ 18 An organization organ 19 An organization organ	foundation because it is: of churches, or associat section 770(b)?((A)(ii), rathre hospital service on granization operated in or ted for the benefit of a c ted for the benefit of a c ted for the benefit of a c ted for the benefit of a c all government or govern mormally receives a subsi- (compite Part II), ascribed in section 770(b) science in section 770(b) in section 170(b) compite Part II), business taxable incom the operated exclu- lized and operated exclu- lized and operated exclu- ed organizations describ-	(For lines 1 through 12, c	heck only one box.) I in section 1700b/(1)(A)() described in section arro(b)(1)(A)() described in section arro(b)(1)(A) arro(b)(1)(A) arro(b)(1)(A) arro(b)(1)(A) (1)(A) arro(b)(1)(A) (1)(A) arro(b)(1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A) (1)(A	(I)(A)(I). II). III 170(b)(1)(A)(III). Enter wernmental unit describ (v). unit or from the general anction with a land-grant , and state of the college III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. III. II	ed h public described in college e or nd gross receipts from from gross investment after June 80, 1975. purposes of one or	Include any "unusual grants.")
a Type I. A supportin the supported onga organization. You T b Type II. A support control or managen organization(2). You c Type II functional Its supported organ d Type II non-functi that is not function	g organization operated, nization(s) the power to r nust complete Part IV, 4 ng organization supervise entro of the supporting on a must complete Part IV y integrated. A support ization(s) (see instruction onally integrated. The organ ally integrated. The organ	supervised, or controlled egularly appoint or elect a Sections A and D. ed or controlled in connec ganization vested in the s	by its supported org in majority of the direct tion with its supports ame persons that co in connection with, Part IV, Sections A, rated in connection v distribution rec	anization(s), typically by tors or trustees of the s ed organization(s), by ha nbroi or manage the sup and functionally integrate D, and E. with its supported organi guirement and an attenti	upporting ported ed with, ization(s)	and income non-stand sources 9 Net income from unrelated business activities, whether or not the business is regularly carried on 10 Other income. Do not include gain or ioss from the sale of capital assets (Sprinkin in Part VI) 11 Total support. Add lines 7 drough 10 12 Gross receipts from related activities, et 13 First five years. If the Form 90 is for th programation, check this box and stop P ublic Section C. Computation of Public
e Check this box if th	e organization received a ted, or Type III non-functi rted organizations	written determination fro onally integrated supporti ted organization(s). (III) Type of organization (described on lines 1-10	m the IRS that it is a ing organization. Missic operation isot		(vi) Amount of other	14 Public support percentage for 2018 (line 16 Public support percentage from 2017 S 16a 33 1/37s support test - 2018. If the org stop here. The organization qualifies as b 33 1/37s support test - 2017. If the org
		above (see instructions)	Yes No			and stop here. The organization qualit 17a 10% -facts-and-circumstances test - and if the organization meets the 'facts meets the 'facts-and-circumstances' the b 10% -facts-and-circumstances test - more, and if the organization meets the organization meets the 'facts-and-circu 18 Private foundation. If the organization
			1 1			

ED SCHOOL 47-1901769 Page 2 nizations Described in Sections 170(b)(1)(A)(iv) and 170(b)(1)(A)(vi) ox on line 5, 7, or 8 of Part I or if the organization failed to quality under Part III. If the organization below, please complete Part III.) 2014 (b) 2015 (c) 2016 (d) 2017 (e) 2018 (f) Total) 2014 (b) 2015 (c) 2016 (d) 2017 (e) 2018 (f) Total 12 e instructions) ganization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) port Percentage olumn (f) divided by line 11, column (f) 14 96 ule A, Part II, line 14 16 96 ation did not check the box on line 13, and line 14 is 33 1/3% or more, check this box and blicly supported organization ation did not check a box on line 13 or 16a, and line 15 is 33 1/3% or more, check this box a publicly supported organization If the organization did not check a box on line 13, 16a, or 16b, and line 14 is 10% or more, circumstances' test, check this box and stop here. Explain in Part VI how the organization **>** e organization qualifies as a publicly supported organization If the organization did not check a box on line 13, 16a, 16b, or 17a, and line 15 is 10% or s-and-circumstances" test, check this box and stop here. Explain in Part VI how the nces' test. The organization qualifies as a publicly supported organization ot check a box on line 13. 16a. 16b. 17a. or 17b. check this box and see instructions Schedule A (Form 990 or 990-EZ) 2018

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	tX	Balance Sheet				01769 Page
		Check If Schedule O contains a response or note to any line in this Par	×			
		check in Schedule of contains a response of note to any the in onis Par	A	(A) Beginning of year		(D) End of year
-			-	164,919.		176,764
		Cash - non-interest-bearing		104,919.	1	1/0,/04
		Savings and temporary cash investments		CO CO4	2	64 350
		Pledges and grants receivable, net		60,684.	3	64,356
		Accounts receivable, net			4	1,003
	6	Loans and other receivables from current and former officers, directors				
		trustees, key employees, and highest compensated employees. Compl Part II of Schedule L			6	
	6	Loans and other receivables from other disgualified persons (as defined				
		section 4958(f)(1)), persons described in section 4958(c)(3)(B), and cont				
		employers and sponsoring organizations of section 501(c)(9) voluntary	- and a second			
		employees' beneficiary organizations (see instr). Complete Part II of Sci			6	
Assets	7	Notes and loans receivable, net			7	
		Inventories for sale or use		6	8	
	-	Prepaid expenses and deferred charges			9	
		Land, buildings, and equipment: cost or other				
	104	basis. Complete Part VI of Schedule D 10a				
		Less: accumulated depreciation 10b			10c	
	11	Investments - publicly traded securities	12/2020/01		11	
	12	Investments - other securities. See Part IV, line 11		3	12	
	13	Investments · program-related. See Part IV, line 11		2	13	
	14	Intangible assets			14	
	16	Other assets. See Part IV, line 11			16	
	16	Total assets. Add lines 1 through 15 (must equal line 34)		225,603.	16	248,983
	17	Accounts payable and accrued expenses		25,280.	17	105.422
	18	Grants payable			18	
	19	Deferred revenue			19	
	20	Tax-exempt bond liabilities		2	20	
	21	Escrow or custodial account liability. Complete Part IV of Schedule D			21	
_	22	Loans and other payables to current and former officers, directors, trus				
8	~~	key employees, highest compensated employees, and disqualified per				
		Complete Part II of Schedule L			22	
5	23	Secured mortgages and notes payable to unrelated third parties		2	23	
	24	Unsecured notes and loans payable to unrelated third parties			24	
		Other liabilities (including federal income tax, payables to related third		0		
		parties, and other liabilities not included on lines 17-24). Complete Part	Xot			
		Schedule D			25	
	26	Total liabilities. Add lines 17 through 25		25,280.		105,422
		Organizations that follow 3FA3 117 (ASC 958), check here 🕨 🛛	and			
		complete lines 27 through 29, and lines 33 and 34.				
ĕ	27	Unrestricted net assets	I	200,323.	27	143,561
	28	Temporarily restricted net assets		3	28	
8	29	Permanently restricted net assets			29	
š		Organizations that do not follow SFAS 117 (ASC 958), check here				
Assets or Fund Balances		and complete lines 30 through 34.				
2	30	Capital stock or trust principal, or current funds	I		30	
	31	Paid-in or capital surplus, or land, building, or equipment fund		8	31	
ž,	32	Retained earnings, endowment, accumulated income, or other funds			32	
Net	33	Total net assets or fund balances		200,323.	33	143,561
	34	Total liabilities and net assets/fund balances		225,603.	34	248,983

	990 (2018) ROOTED SCHOOL	47-1	901769	Pa	ac 1
d	rt XI Reconciliation of Net Assets				
_	Check If Schedule O contains a response or note to any line in this Part XI				
1	Total revenue (must equal Part VIII, column (A), line 12)	1	2,00	0,3	99
2	Total expenses (must equal Part IX, column (A), line 25)	2	2,05	7,1	61
3	Revenue less expenses. Subtract line 2 from line 1	3	-5	6,7	62
	Net assets or fund balances at beginning of year (must equal Part X, line 33, column (A))	4	20	0,3	23
	Net unrealized gains (losses) on investments	6			
	Donated services and use of facilities	6			
	Investment expenses	7			
	Prior period adjustments	8			
,	Other changes in net assets or fund balances (explain in Schedule O)	9			0
,	Net assets or fund balances at end of year. Combine lines 3 through 9 (must equal Part X, line 33, column (B))	10	14	3,5	
a	rt XII Financial Statements and Reporting				
-	Check If Schedule O contains a response or note to any line in this Part XII				[X
a	If the organization changed its method of accounting from a prior year or checked "other," explain in Schedule Were the organization's financial statements compiled or reviewed by an independent accountant? If "Yes," check a box below to indicate whether the financial statements for the year were compiled or reviewe		23		X
	separate basis, consolidated basis, or both: Separate basis Consolidated basis Both consolidated and separate basis				
b			26	x	
b	Separate basis Consolidated basis Both consolidated and separate basis		<u>2b</u>	x	
	Separate basis Consolidated basis Both consolidated and separate basis Were the organization's financial statements audited by an independent accountant? I'Ves, 'dneck a box below to indicate whether the financial statements for the year were audited on a separat consolidated basis, or both	e basis, e audit,		x	
	Separate basis Consolidated basis Both consolidated and separate basis Were the organization's financial statements audited by an independent accountant? If "Yes," check a box below to indicate whether the financial statements for the year were audited on a separate consolidated basis, or both: Separate basis Consolidated basis Both consolidated and separate basis T'es' ''''''''''''''''''''''''''''''	e basis, e audit,			
c	Separate basis Consolidated basis Both consolidated and separate basis Were the organization's financial statements audited by an independent accountant? If "Yes," check a box below to indicate whether the financial statements for the year were audited on a separat consolidated basis, or both: Separate basis Consolidated basis Both consolidated and separate basis If "Yes" to line 2a or 2b, does the organization have a committee that assumes responsibility for oversight of th review, or compliation of its financial statements and selection of an independent accountant?	e basis, e audit, edule O.			
c	Separate basis Consolidated basis Both consolidated and separate basis Were the organization's financial statements audited by an independent accountant? If "Yes," check a box below to indicate whether the financial statements for the year were audited on a separat consolidated basis, or both: X Separate basis Consolidated basis Both consolidated and separate basis Y'ves' to line 2a or 2b, does the organization have a committee that assumes responsibility for oversight of th review, or compilation of its financial statements and selection of an independent accountant? Here organization changed either Its oversight process or selection process during the tax year, explain in Sch	e basis, e audit, edule O. ngle Audit			x
c	Separate basis Consolidated basis Both consolidated and separate basis Were the organization's financial statements audited by an independent accountant? If "Ves, "check a box below to indicate whether the financial statements for the year were audited on a separate consolidated basis, or both: X Separate basis Consolidated basis Both consolidated asparate basis If ves ' the a or b), does the organization have a committee that assumes responsibility for oversight of th review, or compliation of its financial statements and selection of an independent accountant? If the organization have a committee that assumes responsibility for oversight of th review, or compliation of its financial isotements and selection process during the tax year, explain in Sch As a result of a federal award, was the organization nequired to undergo an audit or audits as set forth in the Si	e basis, e audit, edule O. ngle Audit	<u>2c</u>		x

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ow, please com	plete Part IL)		840104400		
(a) 2014	(b) 2015	(c) 2016	(d) 2017	(e) 2018	(f) Total
10/2014	1072015	10/2010	10/2011	(0) 2010	
				10 Se	
	1				
	2		· · · · · · · · · · · · · · · · · · ·		
				2 9	
	10 D				
	2			8 8	
	0			<u>0 – 5</u>	
	8			3	
(a) 2014	(b) 2015	(c) 2016	(d) 2017	(e) 2018	(f) Total
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Part IV Supporting Organizations	CHOOL			4
	12 on Part I. If you checked 12a of Part I. complete Sections A			
	te Sections A and C. If you checked 12c of Part I, complete			
	Part I, complete Sections A and D, and complete Part V.)			
Section A. All Supporting Organizations	The complete occurring the by and complete the try			_
		S	Yes I	No
1 Are all of the organization's supported organization	ns listed by name in the organization's governing			
documents? If "No," describe in Part VI how the s	upported organizations are designated. If designated by			
class or purpose, describe the designation. If histor		1		_
2 Did the organization have any supported organizat	tion that does not have an IRS determination of status			
under section 509(a)(1) or (2)? If "Yes," explain in	Part VI how the organization determined that the supported			
organization was described in section 509(a)(1) or (2).	2	_	
3a Did the organization have a supported organization	n described in section 501(c)(4), (5), or (6)? # "Yes," answer			
(b) and (c) below.		3a		
	organization qualified under section 501(c)(4), (5), or (6) and			
satisfied the public support tests under section 50	9(a)(2)? If "Yes," describe in Part VI when and how the			
organization made the determination.		3b	_	_
c Did the organization ensure that all support to such a support to such a support to such a support to such a support to such a support to such a support to such a support to such a support to such a support to such a support to such a support to such a support to such a support to such a support to such a support to such a support to such a support to such a support to such a support to such a support to such a support to such a support to such a support to such a support to such a support to such a support to such a support to such a support to such a support to such a support to such a support to such a support to such a support to such a support to such a support to such a support to such a support to such a support to such a support to such a support to such a support to such a support to such a support to such a support to such a support to such a support to such a support to such a support to such a support to such a support to such a support to such a support to such a support to such a support to such a support to such a support to such a support to such a support to such a support to such a support to such a support to such a support to such a support to such a support to such a support to such a support to such a support to such a support to such a support to such a support to such a support to such a support to such a support to such a support to such a support to such a support to such a support to such a support to such a support to such a support to such a support to such a support to such a support to such a support to such a support to such a support to such a support to such a support to such a support to such a support to such a support to such a support to such a support to such a support to such a support to such a support to such a support to such a support to such a support to such a support to such a support to such a support to such a support to such a support to such a support to such a support to such a support to such a support to such a support to such a support to such a suppor	h organizations was used exclusively for section 170(c)(2)(B)			
purposes? If "Yes," explain in Part VI what control		3c	_	_
	the United States ("foreign supported organization")? #			
"Yes," and If you checked 12a or 12b in Part I, ansi		43	-	
	cretion in deciding whether to make grants to the foreign			
	VI how the organization had such control and discretion			
despite being controlled or supervised by or in con		4b	_	199
	d organization that does not have an IRS determination			
	es,* explain in Part VI what controls the organization used organization was used exclusively for section 170(c)(2)(B)			
	organization was used exclusively for section 170(c)(2)(b)	4c	_	
purposes.	y supported organizations during the tax year? If "yes."	40	-	- 3.9
	le detail in Part VI, including (i) the names and EIN			
	bstituted, or removed; (ii) the reasons for each such action;			
	a document authorbing such action; and ity how the action			
was accomplished (such as by amendment to the		63		-
b Type I or Type II only. Was any added or substitu				199
designated in the organization's organizing docum		5b	-	12
c Substitutions only. Was the substitution the result	it of an event beyond the organization's control?	6c		
	te form of grants or the provision of services or facilities) to			1
anyone other than ()) its supported organizations, (
benefited by one or more of its supported organization	ations, or (III) other supporting organizations that also			
support or benefit one or more of the filing organiz	ation's supported organizations? If "Yes," provide detail in			
Part VI.		6	_	_
7 Did the organization provide a grant, loan, comper	sation, or other similar payment to a substantial contributor			
	ber of a substantial contributor, or a 35% controlled entity with			
regard to a substantial contributor? If "Yes," comp		7	-	_
	person (as defined in section 4958) not described in line 7?			
If "Yes," complete Part I of Schedule L (Form 990 of		8	-	_
9a Was the organization controlled directly or indirect				
	her than foundation managers and organizations described			
In section 509(a)(1) or (2))? If "Yes," provide detail		9a	-	_
	Ine 9a) hold a controlling interest in any entity in which			
the supporting organization had an interest? # "Ye		90	-	-
	e an ownership interest in, or derive any personal benefit			
	also had an interest? If "Yes," provide detail in Part VI.	90		
10a Was the organization subject to the excess busine (9/19) (reparting cartain Type II supporting organ	ss holdings rules of section 4943 because of section Izations, and all Type III non-functionally integrated			
4943(f) (regarding certain Type II supporting organ supporting organizations)? If "Yes," answer 10b bo		10a		
	elow. idings in the tax year? (Use Schedule C, Form 4720, to	104		
b Did the organization have any excess business how determine whether the organization had excess business how		100		
The second more than the terminal had excess but		A (Form 990 or 99		910

_	the A (Form 990 or 990-E2) 2018 ROOTED SCHOOL 47 Supporting Organizations (continued)	-190176	1	2010	Part V Type III Non-Functionally Integrated 509(a)(3) Supporting	Organ	izations	
			Yes	s No	1 Check here if the organization satisfied the integral Part Test as a qualifying			Part VI.) 8
11	Has the organization accepted a gift or contribution from any of the following persons?				other Type II non-functionally integrated supporting organizations must con	plete Se	ctions A through E.	
a	A person who directly or indirectly controls, either alone or together with persons described in (b) and (c)						(A) Prior Year	(B)
	below, the governing body of a supported organization?	11a			Section A - Adjusted Net Income		(A) Phor Year	
b	A family member of a person described in (a) above?	11b	-	2	1 Net short-term capital gain	1		
	A 35% controlled entity of a person described in (a) or (b) above? If "Yes" to a. b. or c. provide detail in Part VI.	11c			2 Recoveries of prior-year distributions	2		
Sec	tion B. Type I Supporting Organizations	-12 - 5089			3 Other gross income (see instructions)	3		3
		_	Yes	s No	4 Add lines 1 through 3	4		
1	Did the directors, trustees, or membership of one or more supported organizations have the power to				5 Depreciation and depletion	6		
	regularly appoint or elect at least a majority of the organization's directors or trustees at all times during the				6 Portion of operating expenses paid or incurred for production or			
	tax year? If "No," describe in Part VI how the supported organization(s) effectively operated, supervised, or				collection of gross income or for management, conservation, or			
	controlled the organization's activities. If the organization had more than one supported organization,				maintenance of property heid for production of income (see instructions)	6	1	12
	describe how the powers to appoint and/or remove directors or trustees were allocated among the supported				7 Other expenses (see instructions)	7		_
	organizations and what conditions or restrictions, if any, applied to such powers during the tax year.	1	-	<u> </u>	8 Adjusted Net Income (subtract lines 5, 6, and 7 from line 4)	8		-
2	Did the organization operate for the benefit of any supported organization other than the supported				Section D - Minimum Asset Amount		(A) Prior Year	(B)
	organization(s) that operated, supervised, or controlled the supporting organization? If "Yes," explain in					_	POT INT TOM	-
	Part VI how providing such benefit carried out the purposes of the supported organization(s) that operated,				1 Aggregate fair market value of all non-exempt-use assets (see			
_	supervised, or controlled the supporting organization.	2			instructions for short tax year or assets held for part of year):	-		
Sec	tion C. Type II Supporting Organizations	128 189	_		a Average monthly value of securities	1a		3
			Yes	s No	b Average monthly cash balances	1b		
1	Were a majority of the organization's directors or trustees during the tax year also a majority of the directors				 Fair market value of other non-exempt-use assets 	1c		3
	or trustees of each of the organization's supported organization(s)? If "No," describe in Part VI how control				d Total (add lines 1a, 1b, and 1c)	1d		-
	or management of the supporting organization was vested in the same persons that controlled or managed				e Discount claimed for blockage or other			
	the supported organizationisi.	1			factors (explain in detail in Part VI):	-		10.
Sec	tion D. All Type III Supporting Organizations				2 Acquisition indebtedness applicable to non-exempt-use assets	2		
			Yes	s No	3 Subtract line 2 from line 1d	3		3
1	Did the organization provide to each of its supported organizations, by the last day of the fifth month of the				4 Cash deemed held for exempt use. Enter 1-1/2% of line 3 (for greater amount,			
	organization's tax year, (i) a written notice describing the type and amount of support provided during the prior tax				see instructions)	4		
	year, (I) a copy of the Form 990 that was most recently filed as of the date of notification, and (II) copies of the				5 Net value of non-exempt-use assets (subtract line 4 from line 3)	5		3
	organization's governing documents in effect on the date of notification, to the extent not previously provided?	1			6 Muttply line 5 by .035	6		
2	Were any of the organization's officers, directors, or trustees either () appointed or elected by the supported	1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 -			7 Recoveries of prior-year distributions	7		8.
	organization(s) or (I) serving on the governing body of a supported organization? If "No," explain in Part VI how				8 Minimum Asset Amount (add line 7 to line 6)	8		
	the organization maintained a close and continuous working relationship with the supported organization(s).	2						
3	By reason of the relationship described in (2), did the organization's supported organizations have a				Section C - Distributable Amount			C
	significant voice in the organization's investment policies and in directing the use of the organization's				1 Adjusted net income for prior year (from Section A. line 8. Column A)	1		
					2 Enter 85% of line 1	2		
	income or assets at all times during the tax year? If "yes," describe in Part VI the role the organization's				3 Minimum asset amount for prior year (from Section B, line B, Column A)			
	Income or assets at all times during the tax year? If "yes," describe in Part VI the role the organization's supported organizations played in this regard.	3				3		
Sec		3			4 Enter greater of line 2 or line 3	3		
	supported organizations played in this regard. tion E. Type III Functionally Integrated Supporting Organizations	3 tions).			Enter greater of line 2 or line 3 Income tax imposed in prior year	4		
	supported prostications sourced in this record. stion E. Type III Functionally Integrated Supporting Organizations <u>Check</u> the low next to the nethod that the organization used to satisfy the Integral Part Test during the year (see Instruc	3 tions).				4		
1	supported ensubinitions labered in this record. stion E. Type III Functionally Integrated Supporting Organizations Check the box next to the method that the organization used to satisfy the Integral Part Test during the year (see Instruct Check the box next to the method that the organization used to satisfy the Integral Part Test during the year (see Instruct The organization satisfied the Activities Test. Complete line 2 below.	3 tions).			5 Income tax imposed in prior year	4		
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1 a b c 2 a	supported ensitiet development of the reased stion E. Type III Functionally Integrated Supporting Organizations Check the bow next to the method that the organization used to satisfy the Integra Part Test during the year (see Instruct The organization statisfied the Activities Test. Complete line 2 below. The organization statisfied the Activities Test. Complete line 2 below. The organization supported a governmental entity. Describe In Part VI how you supported a government entity (se Activities Test. Answer (a) and (b) below. Did substantially all of the organization's activities during the tax year directly further the exempt purposes of the supported organization's activities during the tax year directly further the exempt purposes, how the organization was responsive to those supported organizations, and how the organization determined that these activities described in (a) constitute activities. Did the activities described in (a) constitute activities. Did the activities described in (a) constitute activities have been engaged in's involvement, one or more of the organization's position that its supported organization(s) would have engaged in 'if ''es,'' engin in Part VI the reasons for the organization's position that its supported organization(s) would have engaged in these	ee Instructions		s No	Income tax Imposed In prior year Otstributable Amount. Subtract line 5 from line 4, unless subject to ensemenc: liennograry reduction (see Instructions) Oteck line If the current year is the organization's first as a non-functionally	4 6		
1 a b c 2 a b	supported granitations usined in this record. trion E. Type III Functionally Integrated Supporting Organizations: Check the box next to the method that the organization used to satisfy the Integral Part Test during the year (see Instruct The organization statisfied the Activities Test. Complete line 2 below. The organization supported a governmental entity. Describe in Part VI how you supported a government entity (so Activities Test. Answer (a) and (b) below. Did substantiation's in the organization was responsive? If "yes," then in Part VI identity those supported organization(s) to which the organization was responsive? If "yes," then in Part VI identity those supported organization(s) to which the organization was responsive? If "yes," then in Part VI identity those supported organizations and explain how these activities during the saturation is involvement, one or more of the organization was responsive to those supported organization's involvement, one or more of the organization's position that its supported organization's involvement, one or more of the organization's position that its supported organization's would have engaged in these activities during the organization's position that its supported organization's would have engaged in these activities organization's position that its supported organization's would have engaged in these activities activities organization's position that its supported organization's would have engaged in these activities would have engaged in these	ee Instructions		s No	Income tax Imposed In prior year Otstributable Amount. Subtract line 5 from line 4, unless subject to ensemenc: liennograry reduction (see Instructions) Oteck line If the current year is the organization's first as a non-functionally	4 6		
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1 a b c 2 a b b	supported ensinitiations barred in this repart dision E. Type III Functionally Integrated Supporting Organizations Check the box next to the method that the organization used to satisfy the Integra Part Test during the year (see Instruct The organization satisfied the Activities Test. Complete line 2 below. The organization supported a governmental entity. Describe in Part VI how you supported a government entity (a Activities Test. Answer (a) and (b) below. Did substantially all of the organizations activities during the tax year directly further the exempt purposes of the supported organization(b) which the organization was responsive? If "ves," then in Part VI identity those supported organization(s) substantially of the activities directly furthered ther exempt purposes, how the organization substantial with the organizations, and how the organization determined that these activities constituted substantially all of the activities of the organization is substantially exempted organization(s) substantially, but for the organizations is unstantially and the activities described in (a) constitute activities that, but for the organization's involvement, one or more of the organization's supported organization(s) would have been engaged in? If "ves," explain in Part VI the reasons for the organization's involvement. Parent of Supported Organization's involvement. Parent of Supported Organization's movement.	2a 2b		S No	Income tax Imposed In prior year Otstributable Amount. Subtract line 5 from line 4, unless subject to ensemenc: liennograry reduction (see Instructions) Oteck line If the current year is the organization's first as a non-functionally	4 6		
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1 a b c 2 a b b 3 a	supported organization started in this record.	2a 2b		5 No	Income tax Imposed In prior year Otstributable Amount. Subtract line 5 from line 4, unless subject to ensemenc: liennograry reduction (see Instructions) Oteck line If the current year is the organization's first as a non-functionally	4 6		ganization (s
1 a b c 2 a b 3 a b	supported granications usined in this record. trion E. Type III Functionally Integrated Supporting Organizations Check the how next to the method that the organization used to satisfy the Integral Part Test during the year (see Instruct The organization statisfied the Activities Test. Complete line 2 below. The organization statisfied the Activities Test. Complete line 2 below. The organization supported a governmental entity. Describe in Part VI how you supported a government entity (a Activities Test. Answer (a) and (b) below. Did substantiation's activities during the tax year directly further the exempt purposes of the supported organization(a) to which the organization was responsive? If "yes," then in Part VI identity those supported organization(a) to which the organization was responsive? If "yes," then in Part VI identity those supported organization and explain how these activities directly furthered their exempt purposes, how the organization was responsive to those supported organization's involvement, one or more of the organization's supported organization(s) would have been engaged in? If "yes," explain In Part VI the reasons for the organization's barbornet. Parent of Supported organization's involvement. Parent of Supported organizations, Annow yould have engaged in these activities both the organization's involvement. Parent of Supported organizations, Annow yould have engaged in these activities activities that, but for the organization's involvement, Parent of Supported organizations, Annow yould have engaged in these activities but for the organization's involvement. Parent of Supported organizations, Annow yould have engaged in these activities but for the organization's involvement. Parent of Supported organizations, Annow yould have engaged in these activities but for the organization, Annow you have organization, Annow you have engaged in these activities of the organization's involvement.	2a 2b 3a 3b	Yes		Income tax Imposed In prior year Otstributable Amount. Subtract line 5 from line 4, unless subject to ensemenc: liennograry reduction (see Instructions) Oteck line If the current year is the organization's first as a non-functionally	4 6		

Form 990 or 990-EZ) 2018 ROOTED SCHOOL			7-1901769 Page 6
Type III Non-Functionally Integrated 509(a)(3) Supporting	0 0		
Check here if the organization satisfied the integral Part Test as a qualifying	trust on I	Nov. 20, 1970 (explain in F	art VI.) See Instructions. All
ther Type II non-functionally integrated supporting organizations must co	mplete Ser	ctions A through E.	
Adjusted Net Income		(A) Prior Year	(B) Current Year (optional)
ort-term capital gain	1		
ries of prior-year distributions	2		
ross income (see instructions)	3	8	
es 1 through 3	4		
lation and depiction	6		
of operating expenses paid or incurred for production or			
ion of gross income or for management, conservation, or			
nance of property held for production of income (see instructions)	6		
expenses (see instructions)	7		
ed Net Income (subtract lines 5, 6, and 7 from line 4)	8		1
Minimum Asset Amount		(A) Prior Year	(B) Current Year (optional)
ate fair market value of all non-exempt-use assets (see Bons for short tax year or assets heid for part of year):			
e monthly value of securities	1a	()	
e monthly cash balances	1b		
irket value of other non-exempt-use assets	1c		1
add lines 1a, 1b, and 1c)	1d		7.
int claimed for blockage or other			
(explain in detail in Part VI):	1 2		
ition indebtedness applicable to non-exempt-use assets	2		
ct line 2 from line 1d	3		1
eemed held for exempt use. Enter 1-1/2% of line 3 (for greater amount, tructions)	4		
ue of non-exempt-use assets (subtract line 4 from line 3)	5		12
v line 5 by .035	6		
ries of prior-year distributions	7	e	(C)
m Asset Amount (add line 7 to line 6)	8		
Distributable Amount			Current Year
ed net income for prior year (from Section A. line 8. Column A)	1		
5% of line 1	2		
m asset amount for prior year (from Section B, line B, Column A)	3		
reater of line 2 or line 3	4		1

47-1901769 Page 6

Schedule A (Form 990 or 990-EZ) 2018

art V Type III Non-Functionally Integrated 509(ction D - Distributions		(contradictly)	Current Year
Amounts paid to supported organizations to accomplish exer			ourrent rear
Amounts paid to supported ordanizations to accomplish exer Amounts paid to perform activity that directly furthers exemp			
Amounts paid to perform activity that directly furthers exemp organizations, in excess of income from activity	a parposes or supported		
Administrative expenses paid to accomplish exempt purpose	a of supported organizations		
Administrative expenses baid to accomplish exempt burbose Amounts paid to acquire exempt-use assets	-s or septonce presentations		
Qualified set-aside amounts (prior IRS approval required)			
Other distributions (describe in Part VI). See instructions.			
Total annual distributions. Add lines 1 through 6.			
Distributions to attentive supported organizations to which the	a organization is responsive		
(provide details in Part VI). See instructions.	ie organization is responsive		
Distributable amount for 2018 from Section C, line 6			
Line 8 amount divided by line 9 amount			
ction E - Distribution Allocations (see Instructions)	(I) Excess Distributions	(II) Underdistributions Pre-2018	(III) Distributable Amount for 2018
Distributable amount for 2018 from Section C. line 6			
Underdistributions, if any, for years prior to 2018 (reason-			
able cause required- explain in Part VI). See instructions.			
Excess distributions carryover, if any, to 2018			
a From 2013			
b From 2014			
c From 2015			
d From 2016			
e From 2017			
Total of lines 3a through e			
9 Applied to underdistributions of prior years			
Applied to 2018 distributable amount			
Carryover from 2013 not applied (see instructions)			
Remainder, Subtract lines 3g, 3h, and 3i from 3f.			
Distributions for 2018 from Section D,			
inc 7: \$			
Applied to underdistributions of prior years			
b Applied to 2018 distributions of phoryears			
c Remainder, Subtract lines 4a and 4b from 4.			
Remaining underdistributions for years prior to 2018, if			
any. Subtract lines 3g and 4a from line 2. For result greater			
any. Subtract lines ag and 4a from line 2. For result greater than zero, explain in Part VI. See instructions.			
than zero, explain in Part VI, See Instructions. Remaining underdistributions for 2018, Subtract lines 3h			
and 4b from line 1. For result greater than zero, explain in			
and 40 from line 1. For result greater than zero, explain in Part VI. See instructions.			
Part VI. See Instructions. Excess distributions carryover to 2019. Add lines 3			
and 4c.			
Breakdown of line 7:			
a Excess from 2014			
b Excess from 2015			
Excess from 2016			
d Excess from 2017			

art VI	Part IV, Section A, lines 1, 2, 3b, 3c, 4b, 4c, 5a, 6, 9a, 9b, 9c, 11a, 11b, and 11c; Part N, Section B, lines 1 and 2; Part IV, Section C					
	line 1: Part IV, Section D, lines 2 and 8; Part IV, Section E, lines 1c, 2a, 2b, 8a, and 8 Section D, lines 5, 6, and 8; and Part V, Section E, lines 2, 5, and 6. Also complete th (See Instructions.)	b; Part V, line 1; Part V, Section B, line 1e; Part V				

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Schedule B	Schedule of Contributors	OMB No. 1545-0047
(Form 990, 990-EZ, or 990-PF) Department of the Treasury Internal Revenue Service	 Attach to Form 990, Form 990-EZ, or Form 990-PF. Go to www.irs.gov/Form990 for the latest information. 	2018
Name of the organization		Employer Identification number
R	COTED SCHOOL	47-1901769
Organization type (check	one):	
Filers of:	Section:	
Form 990 or 990-EZ	X 501(c)(3) (enter number) organization	
	4947(a)(1) nonexempt charitable trust not treated as a private foundation	
	527 political organization	
Form 990-PF	501(c)(3) exempt private foundation	
	4947(a)(1) nonexempt charitable trust treated as a private foundation	
	501(c)(3) taxable private foundation	
	is covered by the General Rule or a Special Rule. ()(7), (8), or (10) organization can check boxes for both the General Rule and a Special F	iule. See Instructions.
	on filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totall y one contributor. Complete Parts I and II. See instructions for determining a contributor.	
Special Rules		
sections 509(a)(1 any one contribut	on described in section 501(c)(3) filing Form 990 or 990-E2 that met the 38 1/8% suppo) and 1700b)(1)(A(M), that checked Schedule A (Form 990 or 990-E2), Part II, Ine 13, 16: tor, during the year, total contributions of the greater of (1) \$5,000; or (2) 2% of the am Z, line 1. Complete Parts I and II.	a, or 16b, and that received from
year, total contrit	on described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received hor utions of more than \$1,000 exclusively for religious, charitable, scientific, literary, or ed eity to children or animals. Complete Parts I (entering *N/A* in column (b) instead of the	lucational purposes, or for the
For an organizati	on described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from	n any one contributor, during the

Por an organization desclose in sections or (k, //, k), or (or imag norm 350 or 350 c. that receive union any one combination, so that the section of this box is checked, enter here the total contributions that were received during the year (or an exclusion) religious, chartable, etc., purpose, but is this organization because it received monexclusively religious, chartable, etc., contributions totaling \$5,000 or more during the year (or an exclusion) religious, chartable, etc., purpose. Durit complete any of the parts unless the General Rule applies to this organization because it received monexclusively religious, chartable, etc., contributions totaling \$5,000 or more during the year (or an exclusive) religious, chartable, etc., contributions totaling \$5,000 or more during the year (or an exclusive) religious, chartable, etc., contributions totaling \$5,000 or more during the year (or an exclusive) religious, chartable, etc., contributions totaling \$5,000 or more during the year (or an exclusive) religious, chartable, etc., contributions totaling \$5,000 or more during the year (or an exclusive) religious, chartable, etc., contributions totaling \$5,000 or more during the year (or an exclusive) religious, chartable, etc., contributions totaling \$5,000 or more during the year (or an exclusive) religious, chartable, etc., contributions totaling \$5,000 or more during the year (or an exclusive) religious, chartable, etc., contributions totaling \$5,000 or more during the year (or an exclusive) religious, chartable, etc., contributions totaling \$5,000 or more during the year (or an exclusive) religious, chartable, etc., contributions totaling \$5,000 or more during the year (or an exclusive) religious, chartable, etc., contributions totaling \$5,000 or more during the year (or an exclusive) religious, chartable, etc., contributions totaling \$5,000 or more during the year (or an exclusive) religious, chartable, etc., contributions totaling \$5,000 or more during the year (or an exclusive) religious, chartable, etc., co

Caution: An organization that Isn't covered by the General Rule and/or the Special Rules doesn't file Schedule B (Form 990, 990-EZ, or 990-PF), but it must answer 'No' on Part IV, line 2, of its Form 990; or check the box on line H of its Form 990-EZ or on its Form 990-PF, Part I, line 2, to certly that it doesn't meet the filling requirements of Schedule B (Form 990, 990-BZ, or 990-PF).

LHA For Paperwork Reduction Act Notice, see the instructions for Form 990, 990-EZ, or 990-PF.

Schedule 5 (Form 990, 990-EZ, or 990-PF) (2018)

823451 11-08-18

	rganization		over identification number	
	D SCHOOL	CONTRACTOR STORES	7-1901769	
Part I	Contributors (see Instructions). Use duplicate copies of Part I if addit	donal space is needed.		
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution	
1	NEW SCHOOLS FOR NEW ORLEANS	_	Person X Payroll	
	1555 POYDRAS ST SUITE 781 NEW ORLEANS, LA 70112	\$ 83,850.	Noncash (Complete Part II for noncash contributions.)	
	MEN ONDEAND, HA /VIII		interest considerations.	
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution	
2	NEW SCHOOLS VENTURE FUND	_	Person X Payroll	
	1616 FRANKLIN STREET, SECOND FLOOR	\$ 130,000.	Noncash (Complete Part II for	
	OAKLAND, CA 94612		noncash contributions.)	
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution	
3	THE MIND TRUST		Person X	
	1630 N MERIDIAN ST	\$ 75,000.	Payroll Noncash	
	INDIANAPOLIS, IN 46202	_	(Complete Part II for noncash contributions.)	
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution	
4	YOUTH FORCE NOLA	_	Person X	
	625 CELESTE STREET, MAILBOX 108 \$		Payroll Noncash	
	NEW ORLEANS, LA 70130	_	(Complete Part II for noncash contributions.)	
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution	
5	DELL (VIA 4.0 SCHOOLS)	_	Person X	
	612 ANDREW HIGGINS BLVD 3RD FLOOR	\$ 50,000.	Payroll Noncash	
	NEW ORLEANS, LA 70130	_	(Complete Part II for noncash contributions.)	
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution	
6	THE LOUIS CALDER FOUNDATION		Person X	
	999 18TH STREET, SUITE 23505	\$ 100,000.	Payroll Noncash	
	DENVER, CO 80202		(Complete Part II for noncash contributions.)	
823452 11-0	-11 22	Schedule B (Form	1990, 990-EZ, or 990-PF) (201	

ame of or	rganization	Em	ployer identification number	Name of org	anization		Employer Identification nu
OOTEI	SCHOOL		47-1901769	ROOTED	SCHOOL		47-1901769
Part I	Contributors (see Instructions). Use duplicate copies of Part I If ad	ditional space is needed.		Part II	Noncash Property (see instructions). Use duplicate copies of Pa	rt II If additional space is needed	L
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution	(a) No. from	(b) Description of noncash property given	(c) FMV (or estimate (See instructions.)	
7	BOOTH BRIKER FUND 826 UNION 5T STE 300	\$100,000	Person X Payroll Noncash (Complete Part II for	Parti			
	NEW ORLEANS, LA 70112	_	noncash contributions.)			\$	
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution	(a) No. from	(b) Description of noncash property given	(c) FMV (or estimate	
8	PROBONO PUBLICO P.O. BOX 531024	s 15,000.	Person X Payroll Noncash	Part I		(See instructions.)	,
	NEW ORLEANS, LA 70153		(Complete Part II for noncash contributions.)			\$	
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution	(a) No. from	(b) Description of noncash property given	(c) FMV (or estimate (See instructions.)	
9	ENTERGY CORPORATION 1600 PERDIDO ST NEW ORLEANS, LA 90112	\$5,000.	Person X Payroli Noncash (Complete Part II for noncash contributions.)	Parti		=	·
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution	(a) No. from	(b) Description of noncash property given	(c) FMV (or estimate	
-		\$	Person Payroll Noncash	Parti		(See instructions.)	,
		_	(Complete Part II for noncash contributions.)			\$	
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution Person	(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate (See instructions.)	
		\$	Payroll Noncash Complete Part II for	_		=	
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution	(a) No.	(b)	(c) FMV (or estimate	
-			Person Payroll	from Part I	Description of noncash property given	(See Instructions.)	
			Noncash Complete Part II for noncash contributions.)		-	s	
3452 11-08	23	Schedule D (Fo	rm 990, 990-EZ, or 990-PF) (2018)	823453 11-08-1	24	3 Schedule 1	6 (Form 990, 990-EZ, or 990-

213-1181

Name of org	anization		Employer Identification number	(Form 990)
				Department of th
	SCHOOL	loss is seminations described in sector	47-1901769 n 501(c)(7), (8), or (10) that total more than \$1,000 for the year	Department of B Internal Revenue
Partin	from any one contributor. Complete columns () through (e) and the following line entry. Fo	or organizations	Name of th
	completing Part II, online the total of exclusively religious,	charitable, etc., contributions of \$1,000 or less	for the year. (Edit Bisials, acc.) > 3	Part I
(a) No.	Use duplicate copies of Part III if additional	space is needed.		· urer
from	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held	
Parti				1 Total
		9		2 Aggre
			-	3 Aggre
		5 G		4 Aggre
		(e) Transfer of gift		5 Did th
				are th
- F	Transferee's name, address, a	nd ZIP + 4	Relationship of transferor to transferee	6 Did th
-			2	for ch
				Part II
(a) No.				1 Purpo
Part	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held	
		1.22 C		
				2 Comp
				day o
L				a Total
		(e) Transfer of gift		b Total
				c Numb
F	Transferee's name, address, a	nd ZIP + 4	Relationship of transferor to transferee	d Numb
			E.	listed
	<u></u>		<u></u>	3 Numb
	-		5 ef	year) 4 Numb
(a) No.				6 Does
from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held	violati
				6 Staff:
		2 <u></u>		►_
	<u> </u>	1 <u>00</u>		7 Amou
- F				► \$
		(e) Transfer of gift		8 Does
	Transferee's name, address, a	nd 710 + 4	Relationship of transferor to transferee	and s 9 in Par
H	manarce s name, audress, a		researching of parts for to addistrice	9 in Par
				conse
				Part III
(a) No. from	(b) Purpose of sitt	(c) Use of gift	(d) Description of how gift is held	1a If the
Parti	foli a bose oi ânt	fet eye of Bur	for occurrences or now girt is need	histor
			-	the te
	s22			b if the
			a	treasu
_			-	(I) B
		(e) Transfer of aith		
		(e) Transfer of gift		
	Transferee's name, address		Relationship of transferor to transferee	(II) A
	Transferee's name, address, a		Relationship of transferor to transferee	(II) A 2 If the
	Transferee's name, address, a		Relationship of transferor to transferee	(II) A 2 If the the fo
	Transferee's name, address, a		Relationship of transferor to transferee	(II) A 2 If the the fo 3 Rever
	Transferee's name, address, a		Relationship of transferor to transferee	(III) A: 2 If the the fo 3 Rever <u>b Asset</u> LHA For P

CHEDULE D	Supplement	tal Financial Statements	CHE Ho	1545-0047
form 990)	Complete if the or	ganization answered "Yes" on Form 990, 10, 11a, 11b, 11c, 11d, 11e, 11f, 12a, or 12b. • Attach to Form 990.	20)18
nationest of the Treasury mail Revenue Service	Go to www.Jrs.gov/Form	Attach to Form 990. 990 for instructions and the latest information	n, inspe	ction
me of the organiz			Employer Identificat	tion number
	ROOTED SCHOOL		47-1901	
		ed Funds or Other Similar Funds or A	Accounts. Complete I	the
organiza	tion answered "Yes" on Form 990, Part IV, I			
		(a) Donor advised funds	(b) Funds and other acc	ounts
	t end of year			
	e of contributions to (during year)			
	e of grants from (during year)			
	e at end of year	writing that the assets held in donor advised fu	-d-	
		s exclusive legal control?		No
		advisors in writing that grant funds can be used		
		or donor advisor, or for any other purpose confe		
impermissible p			Yes	No
		rganization answered "Yes" on Form 990, Part I	V, line 7.	
	onservation easements held by the organizat			
	ion of land for public use (e.g., recreation or		ily important land area	
Protection	n of natural habitat	Preservation of a certified	historic structure	
	ion of open space			
Complete lines	2a through 2d If the organization heid a qual	iffed conservation contribution in the form of a c	conservation easement on	the last
day of the tax y	car.		Held at the End of	the Tax Year
a Total number of	conservation easements		2a	
Total acreage re	estricted by conservation easements		2b	
Number of cons	servation easements on a certified historic st	tructure included in (a)	20	
		after 7/25/06, and not on a historic structure	1000	
listed in the Nat	tional Register		2d	
Number of cons	servation easements modified, transferred, re	eleased, extinguished, or terminated by the orga	inization during the tax	
year 🕨				
	es where property subject to conservation es			
	ization have a written policy regarding the pe			
		It holds?		No No
Staff and volunt	eer hours devoted to monitoring, inspecting	, handling of violations, and enforcing conservat	tion easements during the	year
	inses incurred in monitoring, inspecting, han	ndling of violations, and enforcing conservation e	asements during the year	
► S				
		ove satisfy the requirements of section 170(h)(4)(
and section 170	nnna how the organization reports conservat	tion easements in its revenue and expense state		
		ation's financial statements that describes the or		
conservation ea		ation's mancial statements that describes the or	rganization's accounting t	or
art III Organi	izations Maintaining Collections of	of Art, Historical Treasures, or Other	Similar Assets.	
-	e if the organization answered "Yes" on For			
a if the organization	on elected, as permitted under SFAS 116 (A	SC 958), not to report in its revenue statement a	and balance sheet works (of art.
		whibition, education, or research in furtherance o		-
	ootnote to its financial statements that descr			
		SC 958), to report in its revenue statement and	balance sheet works of a	t. historical
treasures, or oth	her similar assets heid for public exhibition, e	education, or research in furtherance of public se	ervice, provide the follows	ng amounts
relating to these	e Items:			
			- F \$	
				1
If the organization	on received or held works of art, historical tr	easures, or other similar assets for financial gain	1 2 2 2 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	
the following an	nounts required to be reported under SFAS	116 (ASC 958) relating to these items:		
a Revenue include	ed on Form 990, Part VIII, line 1			
b Assets Included	In Form 990, Part X			
A For Paperwork	Reduction Act Notice, see the Instruction	ns for Form 990.	Schedule D (For	m 990) 2018
251 10-29-18				
		26	100	
416 13183	9 213-118280-00	2018.05080 ROOTED SCHOO	0L	213-1

Part IV Escrow and Custodial Arran			cu res un rum 330, Part	17, mile 2, 68	(D)			
reported an amount on Form 990, Pa					(E)			
1a is the organization an agent, trustee, custoo		and the second of the diverse of the second	and the sector of the standard		(E)	8		
			assets not included	Yes No		2		
on Form 990, Part X?				Yes No	(9)	-	2	
b If "Yes," explain the arrangement in Part XII	and complete the folio	wing table:			(H)		-	
				Amount	Total. (Col. (b) must equal Form 990, Part X, col. (B) line 12.1			
			10		Part VIII Investments - Program Related.			
d Additions during the year			1d		Complete If the organization answered 'Yes			
e Distributions during the year			1e		(a) Description of investment	(b) Book value	(c) Method of valuation: Cost or e	end-of-year market value
f Ending balance			11		(1)			
2a Did the organization include an amount on F	Form 990, Part X, line 21	1, for escrow or custodial a	count lability?	Yes No	(2)	7		
b if "Yes." explain the arrangement in Part XII	. Check here if the expla	anation has been provided	on Part XIII		(3)			
Part V Endowment Funds. Complete				and the second second	(4)			
			years back (d) Three years b	ack (e) Four years back	(6)			
1a Beginning of year balance		101.000 / 000			(6)	5	3	
b Contributions		8			(7)		3	
c Net investment earnings, gains, and iosses					(8)		-	
		8				8		
d Grants or scholarships	+				(9)			
e Other expenditures for facilities					Tetal. (Col. (b) must equal Form 990, Part X, col. (B) line 13.)			
and programs	<u> </u>	3						
f Administrative expenses					Complete If the organization answered "Yes		e 11d. See Form 990, Part X, line 15.	61- · · ·
g End of year balance						a) Description		(b) Book value
2 Provide the estimated percentage of the cut	ment year end balance ()	(line 1g, column (a)) heid as			(1)			1
a Board designated or quasi-endowment		96			(2)			
b Permanent endowment	96				(3)			3
c Temporarily restricted endowment	96				(4)			
The percentages on lines 2a, 2b, and 2c she	ouid equal 100%				(6)			3
3a Are there endowment funds not in the poss		on that are held and admini	stered for the organization		(6)			8
by:				Yes No	(7)			
by:				Yes No	(7)			
(I) unrelated organizations				3a(I)	(8)			3
(I) unrelated organizations (II) related organizations	where brind as marked	d an Cabacitá De		3a(I) 3a(II)	(8) (9)			
(i) unrelated organizations (ii) related organizations b if "Yes" on line 3a(ii), are the related organiz				3a(I) 3a(II)	(8) (9) Total. (Column (b) must equal Form 990. Part X, col. (8) (0	ne 15.1		•
(i) unrelated organizations (ii) related organizations b if "Yes" on line 3a(i), are the related organiz 4 Describe in Part XIII the intended uses of th	e organization's endown			3a(I) 3a(II)	(8) (9) Total. (Column (b) must count Form 990, Part X. col. (8) IN Part X. Other Liabilities.			
(i) unrelated organizations (ii) related organizations b If "Yes" on line 330(), are the related organiz Compared of the intended uses of the Part VI Land, Buildings, and Equipm	e organization's endown ment.	ment funds.		3a(I) 3a(II)	(a) (9) Total. (Column (b) must equal Form 990, Part X, col. (B) (b) [Part X] Other Liabilities. Complete if the organization answered 'Yes		e 11e or 11f. See Form 990, Part X, line :	
(i) unrelated organizations (ii) related organizations (ii) related organizations b if "ves" on line 3a(i), are the related organization be in Part XIII the intended uses of the Part VII Land, Buildings, and Equipmony Complete if the organization answere	e organization's endowr ment. ed "Yes" on Form 990, F	ment funds. Part IV, line 11a. See Form	990, Part X, line 10.	3a(l) 3a(l) 3b	[8] (3) Total. <u>Column dbi must consol Form 950. Part X. col. (8) B</u> [Part X] Other Liabilities. Complete If the organication answered "Yes 1. (a) Description of flability			
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(i) unrelated organizations (ii) related organizations b If "Yes" on line 3a(i), are the related organiz A <u>Describe in Part XIII the Intended uses of th</u> Part VI Land, Buildings, and Equipn <u>Complete If the organization answere</u> Description of property	e organization's endown ment. ed "Yes" on Form 990, F (a) Cost or oth basis (investme	ment funds. Part IV, line 11a. See Form rer (b) Cost or other	990, Part X, line 10. (c) Accumulated	3a(l) 3a(l) 3b	(a) (b) (c) (e 11e or 11f. See Form 990, Part X, line :	
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3 Using the organization's acquisition, accession, and other records, check any of the following that are a significant use of its collection items	Complete If the organization answered "Yes" of	n Form 990, Part IV, line	11b. See Form 990, Part X, line 12.
(check all that apoly):	(a) Description of security or category (including name of ancarity)	(b) Book value	(c) Method of valuation: Cost or end-of-year market value
a Public exhibition d Loan or exchange programs	(1) Financial derivatives		
b Scholarly research e Other	(2) Closely-heid equity interests		
c Preservation for future generations	(3) Other		
4 Provide a description of the organization's collections and explain how they further the organization's exempt purpose in Part XIII.	(A)		
5 During the year, did the organization solicit or receive donations of art, historical treasures, or other similar assets	(B)		

Yes No

 Schedule D Form 990/2018
 ROOTED
 SCHOOL
 47-1901769
 Page 2

 Part III
 Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets
 Konthued

Schedule D (Form 990) 2018 ROOTED SCHOOL Part VII Investments - Other Securities.

Complete if the organization answered "Yes" on Form 990, Part IV, line 12a.		
	0.000.000	
1 Total revenue, gains, and other support per audited financial statements	1 2,000,399.	
2 Amounts included on line 1 but not on Form 990, Part VII, line 12:		
a Net unrealized gains (losses) on investments		
b Donated services and use of facilities 2b		
c Recoveries of prior year grants 2c		
d Other (Describe in Part XIII.) 2d		
e Add lines 2a through 2d	2e 0.	
3 Subtract line 2e from line 1	3 2,000,399.	
4 Amounts included on Form 990, Part VIII, line 12, but not on line 1:		
a Investment expenses not included on Form 990, Part VIII, line 7b		
b Other (Describe in Part XIII.)4b		
c Add lines 4a and 4b	4c 0.	
5 Total revenue. Add lines 3 and 4c. (This must equal Form 990. Part L line 12.)	5 2,000,399.	
Part XII Reconciliation of Expenses per Audited Financial Statements With Expenses	s per Return.	
Complete if the organization answered "Yes" on Form 990, Part IV, line 12a.		
1 Total expenses and losses per audited financial statements	1 2,057,161.	
2 Amounts included on line 1 but not on Form 990, Part IX, line 25:		
a Donated services and use of facilities 2a		
b Prior year adjustments 2b		
c Other losses 2c		
d Other (Describe in Part XIII.) 2d		
e Add lines 2a through 2d	2e 0.	
3 Subtract line 2e from line 1	3 2,057,161.	
4 Amounts included on Form 990, Part IX, line 25, but not on line 1:		
a investment expenses not included on Form 990, Part VIII, line 7b 4a		
b Other (Describe in Part XIII.) 4b		
c Add lines 4a and 4b	4c 0.	
5 Total expenses. Add lines 3 and 4c. (This must equal Form 990. Part I, line 18.)	5 2,057,161.	
Part XIII Supplemental Information.		
Provide the descriptions required for Part II, lines 3, 5, and 9; Part III, lines 1a and 4; Part IV, lines 1b and 2b; Part	V, line 4; Part X, line 2; Part XI,	
ines 2d and 4b; and Part XII, lines 2d and 4b. Also complete this part to provide any additional information.		
PART X. LINE 2:		
PART X, LINE 2:	OF THOME BAYES	
	OF INCOME TAXES	
THE SCHOOL IS A NONPROFIT ENTITY EXEMPT FROM THE PAYMENT		
PART X, LINE 2: THE SCHOOL IS A NONPROFIT ENTITY EXEMPT FROM THE PAYMENT INDER INTERNAL REVENUE CODE SECTION 501(C)(3). ACCORDINGL		
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art XIII Supplemental Information (continued)	OOL	47-1901769 Page 5
art XIII Supplemental Information continued		
		Schedule D (Form 990) 2018
55 10-28-18	20	
416 131839 213-118280-00	30 2018.05080 ROOTED SCHOOL	213-11

14040416 131839 213-118280-00

630054 10-29-18

29 2018.05080 ROOTED SCHOOL

Schedule D (Form 990) 2018

213-1181 14040416 131839 213-118280-00 2018.05080 ROOTED SCHOOL

SC	HEDULE E	Schools	L	ONE Hb. 1	5.15-001	17
(For	m 990 or 990-EZ)	Complete if the organization answered "Yes" on Form 990,	Г	20	18	
		Part IV, line 13, or Form 990-EZ, Part VI, line 48.	- L	20	10	
	ment of the Treasury Revenue Service	Attach to Form 990 or Form 990-EZ.		Open to		c
	of the organization	Go to www.irs.gov/Form990 for the latest information.	Employer is	Inspect		a har
Name	e of the organization	-		-1901		nber
Par	et 1	ROOTED SCHOOL	4/	-1901	169	
Fai	ici -				YES	NO
	Does the organizat	tion have a racially nondiscriminatory policy toward students by statement in its charter, byla	we		120	140
		strument, or in a resolution of its governing body?	m.a.,	1	x	
2		tion include a statement of its racially nondiscriminatory policy toward students in all its brock	hures,			
	catalogues, and ot	her written communications with the public dealing with student admissions, programs, and	scholarships	2	х	
3	Has the organization	on publicized its racially nondiscriminatory policy through newspaper or broadcast media du	ing the			
	period of solicitation	on for students, or during the registration period if it has no solicitation program, in a way that	t makes			
	the policy known t	o all parts of the general community it serves? If "Yes," please describe. If "No," please expla	in.			
		pace, use Part II		. 3	х	
		MINATORY POLICY AVAILABLE THROUGH ITS WEBSITE A	IND ON	- 1		
	MARKETING	MATERIALS FOR NEW STUDENTS.		-		
				- 1		
				- 1		
	Deer the eventsized	ion maintain the following?		-		
		the racial composition of the student body, faculty, and administrative staff?		4a	х	
		ting that scholarships and other financial assistance are awarded on a racially nondiscriminal				x
		ogues, brochures, announcements, and other written communications to the public dealing v	-			
		ams, and scholarships?		4c	х	
d		ial used by the organization or on its behalf to solicit contributions?			х	
		io' to any of the above, please explain. If you need more space, use Part II.				
	THE SCHOOL	L DOES NOT PROVIDE ANY SCHOLARSHIPS OR FINANCIA	1L	_		
	ASSISTANC	8.		_		
				- 1		
_				- 1		
		tion discriminate by race in any way with respect to:				x
		privlieges?		<u>6a</u> 6b		X
		>:				x
		her financial assistance?				x
		5 [°]		. 6e		x
						х
				. 6g		х
h	Other extracurricul	ar activities?		6h		х
	If you answered "Y	es* to any of the above, please explain. If you need more space, use Part II.				
				-		
				_		
	Deer the everythe	ten mentu anu fasacial ald ar arristance from a nouromantal anno-4		- 6	x	
	-	ion receive any financial aid or assistance from a governmental agency?		<u>6a</u> 6b	•	x
0		ion's right to such aid ever been revoked or suspended? (es' on either line 6a or line 6b, explain on Part II.		60		-
7	-	es: on enter line of or line ob, explain on Part II. tion certify that it has compiled with the applicable requirements of sections 4.01 through 4.0	5 of			
	-	1975-2 C.B. 587, covering racial nondiscrimination? If "No." explain on Part II			х	
LHA			Sohedule E (Fo	orm 990 or !	990-EZ	2018
	-					

Ploying and	explanations required by Part I, lines 3, 4d, 5h, 6b, and 7, as applicable.
Also provide any other additional information.	
LINE 6 - EXPLANATION OF GOVERNM	
LINE 6 - EXPLANATION OF GOVERNM	IENT FINANCIAL AID:
ROOTED SCHOOL IS & PUBLIC CHART	PER SCHOOL PRINCIPALLY FUNDED BY STATE AND
ROOTED DONOOD ID II TODETO OMARI	ar bonoon ininoirinnni ronnan bi binin inb
FEDERAL MONIES.	
832982 10-13-18	Schedule E (Form 990 or 990-EZ) 20

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213-1181 14040416 131839 213-118280-00

SCHEDULE O	Supplemental Information to Form 990 or 990	-EZ	ONE HIL 1345-0847
(Form 990 or 990-EZ)	Complete to provide Information for responses to specific questions on		2018
Department of the Treasary	Form 990 or 990-E2 or to provide any additional Information.		Open to Public
Internal Revenue Service			Inspection
Name of the organization	ROOTED SCHOOL		Identification number 901769

FORM 990, PART VI, SECTION B, LINE 11B:

990 IS PREPARED BY THE ORGANIZATION'S OUTSIDE PUBLIC ACCOUNTING FIRM BASED ON INFORMATION PROVIDED BY MANAGEMENT. ONCE A DRAFT OF THE RETURN IS AVAILABLE, IT IS REVIEWED BY MANAGEMENT WITH ANY CHANGES OR REVISIONS INCORPORATED INTO THE FILING. THE REVISED RETURN IS THEN SUBMITTED TO THE BOARD OF DIRECTORS FOR THEIR REVIEW AND APPROVAL PRIOR TO SUBMITTING TO THE IRS.

FORM 990, PART VI, SECTION B, LINE 12C:

THE OFFICERS, DIRECTORS, AND TRUSTEES ALL SIGN THE CONFLICT OF INTEREST POLICY ON AN ANNUAL BASIS. THE ORGANIZATION ALSO HOLDS MONTHLY BOARD MEETINGS WHERE THE BOARD DISCUSS OPPORTUNITIES AND POTENTIAL CONFLICTS OF INTEREST. IF A CONFLICT OF INTEREST WERE TO ARISE, THE BOARD CHAIR WOULD DIRECT A COMMITTEE OR THE GOVERNING BOARD TO INVESTIGATE THE NATURE OF THE CONFLICT OF INTEREST. FURTHERMORE, THE BOARD CHAIR WOULD THEN DELEGATE THE TASK TO THE GOVERNING BOARD OR COMMITTEE TO RESEARCH ALL FEASIBLE ALTERNATIVES TO EVALUATE IN LIEU OF THE POTENTIAL CONFLICT OF INTEREST.

FORM 990, PART VI, SECTION B, LINE 15:

THE BOARD REVIEWS AND APPROVES THE COMPENSATION AMOUNTS FOR ROOTED'S CEO BASED ON THE MARKET RATE FOR THE POSITION. THE CEO DETERMINES THE COMPENSATION OF OTHER KEY EMPLOYEES OF THE ORGANIZATION IN ACCORDANCE WITH THE MARKET RATE FOR THEIR POSITION (DETERMINED BASED ON DATA PROVIDED BY EXTERNAL CHARTER MANAGEMENT ORGANIZATIONS AND THROUGH COMPARISON STUDIES OF OTHER CHARTER SCHOOLS)

LHA For Paperwork Reduction Act Notice, see the Instru	ctions for Form 990 or 990-EZ.	Schedule O (Forn	n 990 or 990-EZ) (2018)
132211 10-10-10			
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14040416 131839 213-118280-00	2018.05080 ROOTED	SCHOOL	213-1181

Schedule Q (Form 990 or 990-E2) (2018) Name of the organization ROOTED SCHOOL	Employer Identification number 47-1901769
	47-1901709
FORM 990, PART VI, SECTION C, LINE 19:	
THE DOCUMENTS ARE READILY AVAILABLE TO THE PUBLIC UPO	N REQUEST.
FORM 990, PART IX, LINE 11G, OTHER FEES:	
OTHER PROFESSIONAL SERVICES:	
PROGRAM SERVICE EXPENSES	27,606.
MANAGEMENT AND GENERAL EXPENSES	30,546.
FUNDRAISING EXPENSES	4,000.
TOTAL EXPENSES	62,152.
INSTRUCTIONAL - SUBSTITUTE TEACHERS:	
PROGRAM SERVICE EXPENSES	78,091.
MANAGEMENT AND GENERAL EXPENSES	0.
FUNDRAISING EXPENSES	0.
TOTAL EXPENSES	78,091.
COUNSELING SERVICES:	
PROGRAM SERVICE EXPENSES	61,528.
MANAGEMENT AND GENERAL EXPENSES	0.
FUNDRAISING EXPENSES	0.
TOTAL EXPENSES	61,528.
STUDENT TRANSPORT - BU5 COMPANY:	
PROGRAM SERVICE EXPENSES	121,586.
MANAGEMENT AND GENERAL EXPENSES	0.
FUNDRAISING EXPENSES	0.
TOTAL EXPENSES	121,586.
800010 10-10-18 3.4	Schedule O (Form 990 or 990-EZ) (201
40416 131839 213-118280-00 2018.05080 ROOTED	БСНООЬ 213-

Name of the organization	Employer Identification number (Rev. Jar		8868 Application for Automatic Extension of Exempt Organization Re						
ROOTED SCHOOL	47-1901769	Department of	f the Tramery	Flie a separate application for each return.				OME	3 No. 1545-1709
COD SERVICE:		Internal Perven			868 for the latest information.				
PROGRAM SERVICE EXPENSES	99,931.). You can electronically file Form 88 the exception of Form 8870, informa				-	
				extension request must be sent to th					
MANAGEMENT AND GENERAL EXPENSES	0.	filing of thi	is form, visit w	www.irs.gov/e-file-providers/e-file-for-	charities-and-	non-profits.			
FUNDRAISING EXPENSES	0.			th Extension of Time. Only s					
TOTAL EXPENSES	99,931.			d to file an income tax return other th request an extension of time to file in			hips, REMIC:	s, and trusts	
				08			_	er's identifyi	-
TOTAL OTHER FEES ON FORM 990, PART IX, LINE 11G, COL A	423,288.	423,288. Type or Name of exempt organization of print		empt organization or other filer, see I	ation or other flier, see instructions.				n number (EIN)
			ROOTED	SCHOOL	SCHOOL				01769
	d		the by the Number, street, and room or suite no. If a P.			P.O. box, see instructions.			er (SSN)
FROM 990, PART XII, LINE 2C		filing your return. See instructions.		OT CHARLES AVE	a foreign add	iress, see instructions.	35		
THE ORGANIZATION HAS NOT CHANGED THE OVERSIGHT PROCESS OF	R SELECTION	2012025	NEW OR	RLEANS, LA 70130					
DROODER DUDION MUR MAN VEAD				for the return that this application is f					0 1
PROCESS DURIGN THE TAX YEAR.		Application Is For	on		Return	Application Is For			Retur
			or Form 990-8	EZ	01	Form 990-T (corporation)			07
		Form 990-			02	Form 1041-A			08
			0 (Individual)			Form 4720 (other than individu	al)		09
		Form 990-			04	Form 5227 Form 6069			10
			T (sec. 401(a)	or 408(a) trust)	05	Form 6069			11
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Caution: Forms printed from within Adobe Acrobat products may not meet IRS or state taxing agency specifications. When using Acrobat, select the "Actual Size" in the Adobe "Print" dialog.

CLIFTONLARSONALLEN LLP 2210 EAST ROUTE 66 GLENDORA, CA 91740

CLIENT'S COPY

ROOTED SCHOOL 4238 ST CHARLES AVE NEW ORLEANS, LA 70130

Haddhandhalladalad

21000510 131839 213-118280-00

2019.05094 ROOTED SCHOOL



ROOTED SCHOOL 4238 St Charles Ave NEW ORLEANS, LA 70130

ROOTED SCHOOL:

Enclosed is the organization's 2019 Exempt Organization return.

Specific filing instructions are as follows.

FORM 990 RETURN:

This return has qualified for electronic filing. After you have reviewed the return for completeness and accuracy, please sign, date and return Form 8879-EO to our office. We will transmit the return electronically to the IRS and no further action is required. Please return Form 8879-EO to us as soon as possible, but no later than by May 17, 2021 the filing deadline.

In addition, tax-exempt organizations must make available for public inspection a copy of their annual returns for the preceding three years and exemption application, if applicable. An organization generally must furnish filings to anyone who requests them in person or in writing. An exempt organization may meet this requirement by posting all the documents on its website or at another organizations site as part of a database of similar materials. Specific requirements must be met to meet this exception.

When mailing is necessary, we recommend that you use certified mail with postmarked receipts for proof of timely filing.

Be sure to review the returns prior to signing as you have final responsibility for all information included in the returns. If there is anything on the return you do not understand, we would be glad to answer your questions.

Copies of each return are provided for your permanent records. Based on IRS guidance, we generally recommend that you keep supporting documentation for a minimum of seven years; and that you keep copies of the tax returns, and records that support basis for items in the tax return, indefinitely.

We value our relationship with you and thank you for your trust and confidence in allowing us to serve you. If you have any questions regarding the returns or other services that we can assist you with, please do not hesitate to contact us. Some of our best clients come through referrals from existing clients. If you know of anyone who could benefit from our assistance, we would be pleased to speak to him or her.

Sincerely,

CliftonLarsonAllen LLP



CLA (CliftonLarsonAlien LLP) CLAconnect.com

ROOTED SCHOOL

FORM 990 INCOME TAX RETURN

FOR YEAR ENDED JUNE 30, 2020

	IRS e-file Signatur for an Exempt	Organization		
	For calendar year 2018, or facel year beginning JUL 1	0		0040
Department of the Treasury	Do not send to the IR8.			2019
Internal Revenue Service	Go to www.irs.gov/Form88796	EO for the latest information.		
Name of exempt organization			Employer ide	ntification number
BOOMED SQUOOT			47 10	01760
ROOTED SCHOOL			47-19	01/03
Name and title of officer JONATHAN JOHNSO	N			
CEO				
Part I Type of Re	turn and Return Information (Whole Do	ars Only)		
on line 1a, 2a, 3a, 4a, or 6a, whichever is applicable, blan than one line in Part I. 1a Form 990 check here		being filed with this form was blank eturn, then enter 40- on the applicab art VIII, column (A), line 12)	, then leave line le line below. 1b	1b, 2b, 3b, 4b, ^{or} 6b, Do not complete more
2a Form 990-EZ check here		0-EZ, line 9)		
3a Form 1120-POL check he		line 22)		
4a Form 990-PF check here				
5a Form 8868 check here	b Balance Due (Form 8868, line 3c)			
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Return of Organization Exempt From Income Tax Form 990 2019 section 501(c), 527, or 4947(a)(1) of the internal Revenue Code (except private foundati (Rev. January 20 Do not enter social security numbers on this form as it may be made public. Department of the Treasury Internal Revenue Service Open to Pu Go to www.irs.gov/Form990 for instructions and the latest information Inspection A For the 2019 calendar year, or tax year beginning JUL 1, 2019 and ending JUN 30, 2020 C Name of organization D Employer Identification number D Check # Address change change change setan Peud reform terrin-terrin-terrin-ROOTED SCHOOL 47-1901769 Doing business as Number and street (or P.O. box if mail is not delivered to street address) E Telephone number 504-208-6571 Room/su 4238 ST CHARLES AVE City or town, state or province, country, and ZIP or foreign postal code G Gross receipts 5 3,047,306. 1400 NEW ORLEANS, LA 70130 H(a) is this a group return Applica Yes X No F Name and address of principal officer: JONATHAN JOHNSON for subordinates? SAME AS C ABOVE H(b) Are all autorelisates included? Yes No | Tax-exempt status: X 501(c)(3) 501(c) ((insert no.) 4947(a)(1) or 527 If "No," attach a list. (see instructions) J Website: NOOTEDSCHOOL . ORG H(c) Group exemption number L Year of formation: 2014 M State of legal domicile: LA K Form of organization: X Corporation Trust Part I Summary Association Other > Briefly describe the organization's mission or most significant activities: WE EXIST TO PROVIDE OUR STUDENTS 1 PERSONAL PATHWAYS TO FINANCIAL FREEDOM. 2 Check this box > _____ If the organization discontinued its operations or disposed of more than 25% of its net assets 3 Number of voting members of the governing body (Part VI, line 1a) 4 Number of independent voting members of the governing body (Part VI, line 1b) 5 Total number of Individuals employed in calendar year 2019 (Part V, line 2a) 25 6 Total number of volunteers (estimate if necessary) 8 6 7 a Total unrelated business revenue from Part VIII, column (C), line 12 7a 0. 0. b Net unrelated business taxable income from Form 990-T. line 39 7b Current Year 3,035,844. Prior Year 1,995,866. 8 Contributions and grants (Part VIII, line 1h) 9 Program service revenue (Part VIII, line 2g) 0. 0. 0. 10 Investment Income (Part VIII, column (A), lines 3, 4, and 7d) 0. 4.533. 11,462. 11 Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e) 12 Total revenue - add lines 8 through 11 (must equal Part VIII, column (A), line 12) 2,000,399. 3,047,306. 13 Grants and similar amounts paid (Part IX, column (A), lines 1-3) 0 0. 14 Benefits paid to or for members (Part IX, column (A), line 4) 0. 0. 1,100,083. 1,485,492. 16 Salaries, other compensation, employee benefits (Part IX, column (A), lines 5-10) 16a Professional fundraising fees (Part IX, column (A), line 11e) Ο. 0. 59,325. b Total fundraising expenses (Part IX, column (D), line 25) 1,280,129. 2,765,621. 957,078. 17 Other expenses (Part IX, column (A), lines 11a-11d, 11f-24e) 18 Total expenses. Add lines 13-17 (must equal Part IX, column (A), line 25) 19 Revenue less expenses. Subtract line 18 from line 12 -56,762. 281,685. Beginning of Current Year End of Year Not Assisted to 937,722. 248,983. 20 Total assets (Part X, line 16) 105,422. 512,476. 21 Total liabilities (Part X, line 26) 425,246. 143,561. Part II Signature Block Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than officer) is based on all information of which preparer has any knowledge Signature of officer Date

	Print/Type preparer's name	Preparer's signature	Date Det PTIN
Paid B	WADE MCMULLEN	WADE MCMULLEN	05/10/21 setempiers P00541671
Preparer	Firm's name CLIFTONLARSONALL	EN LLP	Firm's EIN > 41-0746749
Use Only	Firm's address 2210 EAST ROUTE	66	
	GLENDORA, CA 917	40	Phone no. (626) 857-7300
May the IB	S discuss this return with the preparer shown abo	we? (see instructions)	X Yes N

	Check If Schedule O contains a response or note to any line in this Part II
	Check in Schedule O contains a response or note to any line in this Part II
1	WE EXIST TO PROVIDE OUR STUDENTS PERSONAL PATHWAYS TO FINANCIAL
	FREEDOM.
2	Did the organization undertake any significant program services during the year which were not listed on the
-	prior Form 990 or 990-EZ?
	If "Yes," describe these new services on Schedule O.
3	Did the organization cease conducting, or make significant changes in how it conducts, any program services?
	If "Yes," describe these changes on Schedule O.
4	Describe the organization's program service accomplishments for each of its three largest program services, as measured by expenses.
	Section 501(c)(8) and 501(c)(4) organizations are required to report the amount of grants and allocations to others, the total expenses, and
	revenue, if any, for each program service reported.
43	(code:)(represent 1,963,310. including grade of 5) (Revenue 5 11,462.)
	ROOTED SCHOOL EXISTS TO PROVIDE PERSONAL PATHWAYS TO FINANCIAL FREEDOM.
	ROOTED SCHOOL IS ORGANIZED TO MANAGE AND OPERATE A PUBLIC CHARTER HIGH
	SCHOOL FOR 9 -12TH GRADE. DURING THE YEAR ENDED JUNE 30, 2020. THE
	ORGANIZATION SERVED APPROXIMATELY 158 STUDENTS.
-	
4b	(code:) (Sameqci) (Shortang galadrad)
40	(Code:) (Expenses 5 technike gravits of 5) (Menness 5)
-	
	<u> </u>
_	
4d	Other program services (Describe on Schedule O.)
	(Expenses 5) (Newwess 5) Total program service expenses IP 1, 963, 310.
	Total program service expenses 1,963,310.
40	Form 990 (2019)

-	t IV Checklist of Required Schedules			_
		_	Yes	No
1	is the organization described in section 501(c)(3) or 4947(a)(1) (other than a private foundation)?			
	If "Yes," complete Schedule A	1	X	
2	Is the organization required to complete Schedule B, Schedule of Contributors?	2	X	1
3	Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for			
	public office? If "Yes," complete Schedule C, Part I	3		X
4	Section 601(c)(3) organizations. Did the organization engage in lobbying activities, or have a section 501(h) election in effect			
	during the tax year? If "Yes," complete Schedule C, Part II	4		X
6	is the organization a section 501(c)(4), 501(c)(5), or 501(c)(6) organization that receives membership dues, assessments, or	1000		0.0028
	similar amounts as defined in Revenue Procedure 98-19? # "Yes," complete Schedule C, Part III	6		X
6	Did the organization maintain any donor advised funds or any similar funds or accounts for which donors have the right to			5
	provide advice on the distribution or investment of amounts in such funds or accounts? If "yes," complete Schedule D, Part I	6		x
7	Did the organization receive or hold a conservation easement, including easements to preserve open space,			1. 1.2
	the environment, historic land areas, or historic structures? If "Yes," complete Schedule D, Part II	7		x
8	Did the organization maintain collections of works of art, historical treasures, or other similar assets? If "Yes," complete	<u> </u>		_
-	Schedule D. Part III	8		x
9	Did the organization report an amount in Part X, line 21, for escrow or custodial account liability, serve as a custodian for	-		_
	amounts not listed in Part X: or provide credit counseling, debt management, credit repair, or debt negotiation services?			
		9		x
	If "Yes," complete Schedule D, Part IV	3		A
10	Did the organization, directly or through a related organization, hold assets in donor-restricted endowments			x
	or in quasi endowments? If "Yes," complete Schedule D, Part V	10		-
11	If the organization's answer to any of the following questions is "Yes," then complete Schedule D, Parts VI, VII, DI, DY, or X			
	as applicable.			1000
а	Did the organization report an amount for land, buildings, and equipment in Part X, line 10? # "Yes," complete Schedule D,			-
	Part VI	11a		X
b	Did the organization report an amount for investments - other securities in Part X, line 12, that is 5% or more of its total			
	assets reported in Part X, line 16? # 'Yes,' complete Schedule D, Part VII	11b		X
c	Did the organization report an amount for investments - program related in Part X, line 13, that is 5% or more of its total			
	assets reported in Part X, line 16? If "Yes," complete Schedule D, Part VIII	110		X
d	Did the organization report an amount for other assets in Part X, line 15, that is 5% or more of its total assets reported in	10.00		1.12
	Part X, line 16? If "Yes," complete Schedule D, Part IX	11d		X
e	Did the organization report an amount for other liabilities in Part X, line 25? If "Yes," complete Schedule D, Part X	11e		X
	Did the organization's separate or consolidated financial statements for the tax year include a footnote that addresses			0.000
	the organization's liability for uncertain tax positions under FIN 48 (ASC 740)? N "Yes," complete Schedule D, Part X	111	X	
12a	Did the organization obtain separate, independent audited financial statements for the tax year? If "Yes," complete			d - 39
-	Schedule D, Parts XI and XII	12a	x	
h	Was the organization included in consolidated, independent audited financial statements for the tax year?			6 52
-	If "Yes," and if the organization answered "No" to line 12a, then completing Schedule D, Parts XI and XII is optional	12b		x
19	is the organization a school described in section 170(b)(1)(A)(i)? If "Yes," complete Schedule E	13	X	_
	Did the organization maintain an office, employees, or agents outside of the United States?	14a		X
		144		
D	Did the organization have aggregate revenues or expenses of more than \$10,000 from grantmaking, fundraising, business,			
	Investment, and program service activities outside the United States, or aggregate foreign investments valued at \$100,000			x
	or more? If "Yes," complete Schedule F, Parts I and IV	14b		A .
16	Did the organization report on Part IX, column (A), line 3, more than \$5,000 of grants or other assistance to or for any			-
	foreign organization? If "Yes," complete Schedule F, Parts II and IV	16		X
16	Did the organization report on Part IX, column (A), line 3, more than \$5,000 of aggregate grants or other assistance to	2.5		5
	or for foreign individuals? If "Yes," complete Schedule F, Parts III and IV	16		X
7	Did the organization report a total of more than \$15,000 of expenses for professional fundraising services on Part IX,			
	column (A), lines 6 and 11e? If "Yes," complete Schedule G, Part I	17		X
18	Did the organization report more than \$15,000 total of fundraising event gross income and contributions on Part VIII, lines			
	1c and 8a? If 'Yes,' complete Schedule G, Part II	18		X
19	Did the organization report more than \$15,000 of gross income from gaming activities on Part VIII, line 9a? # "Yes,"			
	complete Schedule G, Part III	19		x
20a	Did the organization operate one or more hospital facilities? If "Yes," complete Schedule H	20a		x
	If "Yes" to line 20a, did the organization attach a copy of its audited financial statements to this return?	20b		
	Did the organization report more than \$5,000 of grants or other assistance to any domestic organization or			
	domestic government on Part IX, column (A), line 1? If "Yes," complete Schedule I, Parts I and II	21		x
				2019)

Par	990 (2019) ROOTED SCHOOL 47-1901 TIV Checklist of Required Schedules (continued)		
		e 1	Yes
22	Did the organization report more than \$5,000 of grants or other assistance to or for domestic individuals on		
	Part IX, column (A), line 2? If "Yes," complete Schedule I, Parts I and III	22	
23	Did the organization answer "Yes" to Part VII, Section A, line 3, 4, or 5 about compensation of the organization's current		
	and former officers, directors, trustees, key employees, and highest compensated employees? If "Yes," complete		
	Schedule J	23	
24a	Did the organization have a tax-exempt bond issue with an outstanding principal amount of more than \$100,000 as of the		
	last day of the year, that was issued after December 31, 2002? If "Yes," answer lines 24b through 24d and complete		
	Schedule K. If "No," go to line 25a	24a	
b	Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception?	24b	<u> </u>
c	Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease		
	any tax-exempt bonds?	24c	
	Did the organization act as an 'on behalf of' issuer for bonds outstanding at any time during the year?	24d	
26 a	Section 601(c)(3), 601(c)(4), and 601(c)(29) organizations. Did the organization engage in an excess benefit	100	
	transaction with a disqualified person during the year? If "Yes," complete Schedule L, Part I	26a	-
b	is the organization aware that it engaged in an excess benefit transaction with a disqualified person in a prior year, and		
	that the transaction has not been reported on any of the organization's prior Forms 990 or 990-EZ? # "Yes," complete		
	Schedule L, Part I	26b	-
26	Did the organization report any amount on Part X, line 5 or 22, for receivables from or payables to any current		
	or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 85%		
1000	controlled entity or family member of any of these persons? If "Yes," complete Schedule L, Part II	26	-
27	Did the organization provide a grant or other assistance to any current or former officer, director, trustee, key employee,		<u> </u>
	creator or founder, substantial contributor or employee thereof, a grant selection committee member, or to a 35% controlled	100	
	entity (including an employee thereof) or family member of any of these persons? If "Yes," complete Schedule L, Part III	27	
28	Was the organization a party to a business transaction with one of the following parties (see Schedule L, Part IV		
	instructions, for applicable filing thresholds, conditions, and exceptions):		
a	A current or former officer, director, trustee, key employee, creator or founder, or substantial contributor? N		
	"Yes," complete Schedule L, Part IV	28a	-
	A family member of any individual described in line 28a? If "Yes," complete Schedule L, Part IV	280	-
c	A 35% controlled entity of one or more individuals and/or organizations described in lines 28a or 28b? #	-	
	"Yes," complete Schedule L, Part IV	28c	-
	Did the organization receive more than \$25,000 in non-cash contributions? If "Yes," complete Schedule M Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation	29	-
30	contributions? If "Yes," complete Schedule M	30	
24	Did the organization liquidate, terminate, or dissolve and cease operations? If "Yes," complete Schedule N. Part I	31	
	Did the organization represent the source and cease operations: If res, complete schedule N, Part P		
-	Schedule N. Part II	32	
22	Did the organization own 100% of an entity disregarded as separate from the organization under Regulations	-	
99	sections 301.7701-2 and 301.7701-8? # Yes, * complete Schedule R, Part I	33	
34	Was the organization related to any tax-exempt or taxable entity? If "Yes," complete Schedule R, Part II, III, or IV, and	00	
	Part V, line 1	34	
35.2	Did the organization have a controlled entity within the meaning of section 512(b)(18)?	35a	
	If 'Yes' to line 35a, did the organization receive any payment from or engage in any transaction with a controlled entity		
-	within the meaning of section 512(b)(13)? If "Yes," complete Schedule R, Part V, line 2	350	
36	Section 501(c)(3) organizations. Did the organization make any transfers to an exempt non-charitable related organization?		
	If "Yes," complete Schedule R, Part V, line 2	36	
37	Did the organization conduct more than 5% of its activities through an entity that is not a related organization	-	
	and that is treated as a partnership for federal income tax purposes? If "Yes," complete Schedule R, Part VI	37	
38	Did the organization complete Schedule O and provide explanations in Schedule O for Part VI. lines 11b and 19?		
	Note: All Form 990 filers are required to complete Schedule O	38	x
Par	t V Statements Regarding Other IRS Filings and Tax Compliance		
	Check If Schedule O contains a response or note to any line in this Part V		
			Yes
1a	Enter the number reported in Box 3 of Form 1096. Enter -0- if not applicable 1a 6		
	Enter the number of Forms W-2G included in line 1a. Enter -0- If not applicable 1b 0		
	Did the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming	1	
-	(gambling) winnings to prize winners?	10	х
1200	01-20-20	Form	990

	Statements Regarding Other IRS Filings and Tax Compliance (continued				Yes
		1 1			103
22	Enter the number of employees reported on Form W-8, Transmittal of Wage and Tax Statements,	15	25		
	filed for the calendar year ending with or within the year covered by this return				
E	If at least one is reported on line 2a, did the organization file all required federal employment tax reb	ums?		2b	X
	Note: If the sum of lines Ta and 2a is greater than 250, you may be required to e-file (see instructio	ns)			
37	Did the organization have unrelated business gross income of \$1,000 or more during the year?			33	
1	If "Yes," has it flied a Form 990-T for this year? If "No" to line 3b, provide an explanation on Schedul	e 0		3b	
4	At any time during the calendar year, did the organization have an interest in, or a signature or other	authority ov	ver. a	2.14	
	financial account in a foreign country (such as a bank account, securities account, or other financial			4a	
,	If 'Yes,' enter the name of the foreign country	accounty.			
	See Instructions for filing requirements for FInCEN Form 114, Report of Foreign Bank and Financial				
	Was the organization a party to a prohibited tax shelter transaction at any time during the tax year?			6a	-
	Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter trans			6b	-
0	If "Yes" to line 5a or 5b, did the organization file Form 8886-T?			6c	
	Does the organization have annual gross receipts that are normally greater than \$100,000, and did		tion solicit	1.15	
	any contributions that were not tax deductible as charitable contributions?			63	
	If "Yes," did the organization include with every solicitation an express statement that such contribu-		-		-
		actions or give		~	
-	were not tax deductible?			66	-
	Organizations that may receive deductible contributions under section 170(c).				
3	Did the organization receive a payment in excess of \$75 made partly as a contribution and partly for goods and s	ervices provid	ied to the payor?	73	-
t	If "Yes," did the organization notify the donor of the value of the goods or services provided?			7b	
	Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it is	was required	1	4.18	
	to file Form 8282?		Second and the	70	
	If "Yes," indicate the number of Forms 8282 fied during the year	74			
	Did the organization receive any funds, directly or indirectly, to pay premiums on a personal benefit			7e	_
					+
	Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit con			71	-
5	If the organization received a contribution of qualified intellectual property, did the organization file I	Form 8899 a	is required?	79	-
h	If the organization received a contribution of cars, boats, airplanes, or other vehicles, did the organi	zation file a P	Form 1098-C?	7h	
8	Sponsoring organizations maintaining donor advised funds. Did a donor advised fund maintaine	ed by the			
	sponsoring organization have excess business holdings at any time during the year?			8	
9	Sponsoring organizations maintaining donor advised funds.			-	
				9a	_
	Did the sponsoring organization make any taxable distributions under section 4966?				-
	Did the sponsoring organization make a distribution to a donor, donor advisor, or related person?			9b	-
10	Section 601(c)(7) organizations. Enter:	12 31		1	
3	Initiation fees and capital contributions included on Part VIII, line 12	10a			
	Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities	10b			
11	Section 601(c)(12) organizations. Enter:				
	Gross income from members or shareholders	11a			
	Gross income from other sources (Do not net amounts due or paid to other sources against				
	amounts due or received from them.)	110			
127	Section 4947(a)(1) non-exempt charitable trusts. Is the organization filing Form 990 in lieu of For	m 1041°		123	-
	If "Yes," enter the amount of tax-exempt interest received or accrued during the year	12b			
t	Section 601(c)(29) qualified nonprofit health insurance issuers.				
	is the organization licensed to issue gualified health plans in more than one state?			13a	
13	Note: See the instructions for additional information the organization must report on Schedule O.				
13					
13 a	Enter the amount of receives the organization is required to maintain by the states in which the				
13 a	Enter the amount of reserves the organization is required to maintain by the states in which the				
13 3	organization is licensed to issue qualified health plans	13b		-	-
13 a t	organization is licensed to issue qualified health plans Enter the amount of reserves on hand	13b 13c		14a	
13 3 1	organization is licensed to issue qualified health plans	13b 13c			
13 3 143	organization is licensed to issue qualified health plans Enter the amount of reserves on hand			14b	
13 a t 14a t	organization is licensed to issue qualified health plans	tule 0		14b	
13 a t 14a t	organization is licensed to issue qualified health plans	tule O		140	
13 a t 14a t	organization is licensed to issue qualified health plans	tule O			
13 3 14 14 15	organization is licensed to issue qualified health plans	twie O		16	
13 3 14 14 15	organization is licensed to issue qualified health plans	twie O			
13 3 14 14 15	organization is licensed to issue qualified health plans	twie O		16	
13 a t 14a 15	organization is licensed to issue qualified health plans	twie O		16	n 990
13 a t 14a 15	organization is licensed to issue qualified health plans	twie O		16	n 990
13 2 142 15 16	organization is licensed to issue qualified health plans	twie O		16	m 990

Pa	290 (2019) ROOTED SCHOOL 47-190. TVI Governance, Management, and Disclosure For each "Yes" response to lines 2 through 7b below, and for a	"No" -	esnor	200
_	to line 8a, 8b, or 10b below, describe the circumstances, processes, or changes on Schedule O. See Instructions.	i NO A	espons	°C
	Check If Schedule O contains a response or note to any line in this Part VI			X
Sec	tion A. Governing Body and Management			
		-	Yes	No
-	Enter the number of voting members of the governing body at the end of the tax year1a	8	103	110
14	If there are material differences in voting rights among members of the governing body at the end of the governing	Ť		
	body delegated broad authority to an executive committee or similar committee, explain on Schedule 0.			
		8		
	Enter the number of voting members included on line 1a, above, who are independent 1b	4		
2	officer, director, trustee, or key employee have a family relationship or a business relationship with any other officer, director, trustee, or key employee?	2		x
	Did the organization delegate control over management duties customarily performed by or under the direct supervision	2		-
3		1		x
	of officers, directors, trustees, or key employees to a management company or other person?	3		X
4	Did the organization make any significant changes to its governing documents since the prior Form 990 was filed?	4	-	-
6	Did the organization become aware during the year of a significant diversion of the organization's assets?	5	-	X
6	bis de organization nare menoers of stoenhouers.	6	-	X
7a	Did the organization have members, stockholders, or other persons who had the power to elect or appoint one or			-
	more members of the governing body?	73	-	X
b	Are any governance decisions of the organization reserved to (or subject to approval by) members, stockholders, or			
	persons other than the governing body?	7b		X
8	Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following:			
a	The governing body?	8a	х	
b	Each committee with authority to act on behalf of the governing body?	Sb	X	1
9	is there any officer, director, trustee, or key employee listed in Part VII, Section A, who cannot be reached at the			
	organization's mailing address? If "Yes " provide the pages and addresses on Schedule O	9		X
Sec	tion B. Policies (This Section B requests Information about policies not required by the Internal Revenue Code.)			
			Yes	No
103	Did the organization have local chapters, branches, or affiliates?	10a		X
	If "Yes," did the organization have written policies and procedures governing the activities of such chapters, affiliates,	104		-
	and branches to ensure their operations are consistent with the organization's exempt purposes?	100		
	Has the organization provided a complete copy of this Form 990 to all members of its governing body before filing the form?	11a	x	
		114	-	
	Describe in Schedule O the process, if any, used by the organization to review this Form 990.		x	
	Did the organization have a written conflict of interest policy? If "No," go to line 13	12a		-
	Were officers, directors, or trustees, and key employees required to disclose annually interests that could give rise to conflicts?	12b	x	-
c	Did the organization regularly and consistently monitor and enforce compliance with the policy? If "Yes," describe			
	In Schedule O how this was done	12c	X	-
	Did the organization have a written whistlebiower policy?	13	X	_
	Did the organization have a written document retention and destruction policy?	14	X	_
16	Did the process for determining compensation of the following persons include a review and approval by independent			
	persons, comparability data, and contemporaneous substantiation of the deliberation and decision?			
	The organization's CEO, Executive Director, or top management official	16a	X	
b	Other officers or key employees of the organization	15b	X	
	If "Yes" to line 15a or 15b, describe the process in Schedule O (see instructions).			
16a	Did the organization invest in, contribute assets to, or participate in a joint venture or similar arrangement with a			
	taxable entity during the year?	16a		X
100	If "Yes," did the organization follow a written policy or procedure requiring the organization to evaluate its participation			
b				
b	In joint venture arrangements under applicable federal tax law, and take steps to safeguard the organization's			—
b	In joint venture arrangements under applicable federal tax law, and take steps to safeguard the organization's exempti status with respect to such arrangements?	164	1	
	In joint venture arrangements under applicable federal tax law, and take steps to safeguard the organization's exempt status with respect to such arrangements? tion C. Disclosure	16b		
	exempt status with respect to such arrangements?	16b		_
Sec 17	exempt status with respect to such arrangements? tion C. Disclosure List the states with which a copy of this Form 990 is required to be filed NONE	15b	avalla	ble
Sec	exempl status with respect to such ananoements? tion C. Disclosure List the states with which a copy of this Form 990 is required to be filed NONE Section 6104 requires an organization to make its Forms 1023 (1024 or 1024-A, if applicable), 990, and 990-T (Section 501(c))8	16b 3)s only)	availa	ble
Sec 17	exempt status with respect to such arrangements? tion C. Disclosure List the states with which a copy of this Form 990 is required to be filed Section 610 acquires an organization to make its Forms 1023 (1024 or 1024-A, if applicable), 990, and 990-T (Section 501(c)) for public inspection. Indicate how you made these available. Check all that apply	16b 3]s only)	avalla	ble
Sec 17 18	exempti status with respect to such anapoments? tion C. Disclosure Lut the states with which a copy of this Form 990 is required to be filed NONE Section 6104 requires an organization to make its Forms 1003 (1024 or 1024-A, if applicable), 990, and 990-T (Section 501(c)) for public inspection. Indicate how you made these available. Check all that apply. Own website Another's website Vupon request Other (explain on Schedule O)			ble
Sec 17 18	exempl status with respect to such ananoements?			ble
Sec 17 18	exempt status with respect to such ananoements?			bie
Sec 17 18	exempt status with respect to such anapoments?			bie
Sec 17 18	exempl status with respect to such ananoements?			bie
Sec 17 18 19 20	exempti status with respect to such arrangements? tion C. Disclosure List the states with which a copy of this Form 990 is required to be filed NONE Section 5104 regulates an organization to make its Forms 1003 (1024 or 1024-A, If applicable), 990, and 990-T (Section 501(c)) for public inspection. Indicate how you made these available. Check all that apply. Own website Another's website X Upon request Other (explain on Schedule O) Describe on Schedule O whether (and If so, how) the organization made its governing documents, conflict of Interest policy, an statements available to the public during the tax year. State the name, address, and telephone number of the person who possesses the organization's books and records <u>ORGANIZATION - 504-208-6571</u> 4238 67 CHARLES AVENUE, NEW ORLEANS, LA 70115	nd finan	cial	
Sec 17 18 19 20	exempl status with respect to such ananoements?	nd finan		

Employees, and Indeper										_
Check If Schedule O contains a										
Section A. Officers, Directors, Trustees,										
 1a Complete this table for all persons require List all of the organization's current or 										
Enter -0- in columns (D), (E), and (F) if no con			- [m	iicu		- Martin	UUL	s or organizations), regi	adiess of amount of c	ompensation.
List all of the organization's current is										
 List the organization's five earrent high able compensation (Box 5 of Form W-2 and/ 	est compensated e	mpic	yee	s (ot	ther	thar	an	officer, director, trustee,	or key employee) who	o received report
List all of the organization's former of										
reportable compensation from the organizat	ion and any related	orga	niza	tion	5.	-				
 List all of the organization's former di more than \$10,000 of reportable compensation 									or or trustee of the org	anization,
See instructions for the order in which to list					.,	6F 116		partications.		
Check this box if neither the organizat			nizai	tion	c.08	nner	sate	d any current officer, di	ector or trustee	
(A)	(0)				c)	in sta		(D)	(E)	(F)
Name and title	Average	10	-	Pos	tion			Reportable	Reportable	Estimated
	hours per					is both		compensation	compensation	amount of
	(list any	1						from	from related organizations	other
	hours for	or clerch				8		organization	(W-2/1099-MISC)	from the
	related		Tube		-			(W-2/1099-MISC)	1000	organization
	organizations below	dvia dia ste	all the second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second s		sendos	E a		- 10 I		and related organizations
	line)	rdvie	181	000	(i) al	10e	ana.			organizations
(1) JONATHAN JOHNSON	40.00									in the second
CEO				х			-	99,360.	0.	7,601.
(2) RESAMA DUMAND	1.00									
BOARD CHAIR (3) EVLE FINEE	1.00	x		X	-			0.	0.	0.
TREASURER	1.00	*		x				0.	0.	0.
(4) TRAVIS CHASE	1.00	^		-				0.	0.	
BECRETARY		x		х				0.	0.	0.
(5) TONY ZANDERS	1.00									S.
BOARD NEWERR		x						0.	0.	0.
(6) MATT CANDLER	1.00	_			1					
TOARD MEMBER (7) BRANDIN CAMPBELL	1.00	X	-		-		-	0.	0.	0.
BOARD NEWSTR	1.00	x						0.	0.	0.
(8) JOHN ALFORD	1.00	-		-						
BOARD MEMORIA	in the second	x						0.	0.	0.
(9) GERARD WILLIS	1.00									
FARENT LIAISON		x		-		-		0.	0.	0.
	<u> </u>	1								
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	8							1 · · · · ·		
		1			1	1				

(A) Name and title	(D) Average hours per week (list any		not d	Pos	and a	than o	E N E	(D) Reportable compensation from	(E) Reportable compensation from related organizations	-	(F) Estimated amount of other mpensation	
	hours for related organizations below line)	incheculations on dreet	Ind Rutional Instead	Officer	Dies win players	Notest comparated	Farmer	organization (W-2/1099-MISC)	(W-2/1099-MISC)	0	from the rganization nd related ganizations	_
		1					-			+		-
					-		-					
							- 20					
										-		
	-						-			-		-
			_				-			+		
Contraction of the second second second second second second second second second second second second second s	-						2				195-cpc-m	
b Subtotal	Part VII. Section A		_					99,360.	0	-	7,601.	
d Total (add lines 1b and 1c) Total number of individuals (including		lose	liste	d ab	ove) who	> rea	99,360. ceived more than \$100,	0 000 of reportable		7,601.	-
compensation from the organization										_	Yes No	
Did the organization list any former line 1a? If "Yes," complete Schedule	J for such individual									3	x	
For any individual listed on line 1a, is and related organizations greater tha Did any person listed on line 1a recei	n \$150,000? # "Yes,	• co	mpk	ete S	che	duie	J fo	r such individual		4	X	
rendered to the organization? # "ves ection B. Independent Contractors								o organization of individ		6	X	-
Complete this table for your five high the organization. Report compensati										sation 1	from	_
	A) siness address	NO	ONE	2				(B) Description of s	envices		(C) ensation	_
							+					_
							1					_
							+					-
	terr Ünchuding but n	ot In	nited	t to t	thos	e list	red a	above) who received mo	ve than			
Total number of independent contrac \$100.000 of compensation from the					0)						

		Check If Schedule O contains a response or i		(A) Total revenue	(D) Related or exempt function revenue	(C) Unrelated business revenue	(D) Revenue exclude from tax under sections 512 - 5
2.0	1 a	Federated campaigns 1a			1		
one, Gifts, Grants Similar Amounts	b	Membership dues 1b					
1	c	Fundraising events 1c					
<u></u>	d	Related organizations 10		1			
1	e	Government grants (contributions) 1e 2,1	77,610.				
100	1	All other contributions, gifts, grants, and					
			58,234.	-			
Contributions, and Other Sim	9	Hancash contributions included in lines 1a-17 19 \$		0.25 044			
0 8	h	Total. Add lines 1a-1f	lusiness Code	3,035,844.	12 2	-	2.
			ADDITESS COULE				
8	23						2
5 3	b						8
E	c						-
Program Service Revenue					5		6
Å		All other program service revenue					
		Total. Add lines 2a-21	•	i			0
		Investment income (including dividends, interest,					
		other similar amounts)					
	4	income from investment of tax-exempt bond proc			8		÷
		Royalties					
		(i) Real	(I) Personal			-	
	6 a	Gross rents					
		Less: rental expenses 6b					
	c	Rental Income or (loss) 6c			5. A		-
	d	Net rental income or (loss)					
	7 a	Gross amount from sales of (1) Securities	(II) Other				
		assets other than inventory 7a					
	b	Less: cost or other basis					
2		and sales expenses					
Revenue		Gain or (loss)				-	
đ		Net gain or (oss)					
Other	8 3	Gross income from fundraising events (not					
0		Including \$ of					
		contributions reported on line 1c). See					
		Part IV, line 18 8a		-			
		Less: direct expenses Bb					
		Net income or (loss) from fundraising events Gross income from gaming activities. See				-	
	3.9						
		Part IV, line 19		1			
		Net income or (loss) from gaming activities	•				
		Gross sales of inventory, less returns					
		and allowances 10a					
	b	Less: cost of goods sold 10b		1			
		Net income or (loss) from sales of inventory					
		0	tusiness Code				
aneous			900099	10,187.	10,187.		3
	b	OTHER PROGRAM REVENUE	611710	1,275.	1,275.		1
8							
Nin.		All other revenue					
-		Total, Add lines 11a-11d		11,462.			
_	12	Total revenue. See instructions	•	3,047,306.	11,462.	0.	0

	Check # Schedule O contains a respons		r organizations must con his Part IX		X
	not Include amounts reported on lines 6b, 8b, 9b, and 10b of Part VIII.	(A) Total expenses	(D) Program service expenses	(C) Management and general expenses	(D) Fundraising expenses
1	Grants and other assistance to domestic organizations	10			
	and domestic governments. See Part IV, line 21				
2	Grants and other assistance to domestic			9	
	Individuals. See Part IV, line 22				
3					
2	organizations, foreign governments, and foreign				
	Individuals. See Part IV, lines 15 and 16				
4	Benefits paid to or for members			S	
	Compensation of current officers, directors,				
	trustees, and key employees	127,543.	102.034.	25,509.	
6	Compensation not included above to disgualified				
-	persons (as defined under section 4958(f)(1)) and				
	persons described in section 4958(c)(3)(B)				
7	Other salaries and wages	1,134,117.	855,375.	223,997.	54,745
	Pension plan accruals and contributions (include				
-	section 401(k) and 403(b) employer contributions)	34,988.	27,851.	6,077.	1,060
9		96,898.	85,595.	9,050.	2,253
10		91,946.	69,445.	21,234.	1,267
11	Fees for services (nonemployees):				
	Management				
	Legal	37,229.		37,229.	
-	Accounting	41,051.		41,051.	
-	Lobbying				
	Professional fundraising services. See Part IV, line 17				
-		8			
	Other. (If line 11g amount exceeds 10% of line 25,				
2	column (A) amount, list line 11g expenses on Sch 0.)	453,137.	428,277.	24,860.	
12	Advertising and promotion	16,025.	15,222.	803.	
13	Office expenses	13,828.		13.828.	
14	Information technology	CONTRACTOR OF STREET, ST		g statester s	
15	Royalties				
16	Occupancy	226,255.	224,890.	1,365.	
17	Travel	48,429.	565.	47,864.	
18	Payments of travel or entertainment expenses	1.1.1.1.1.1.1.1.1.1.1.1.1.1.1.1.1.1.1.1.		State of the second second second second second second second second second second second second second second	
	for any federal, state, or local public officials	2		2	
19	Conferences, conventions, and meetings				
20	Interest	6			
21	Payments to affiliates				
22	Depreciation, depletion, and amortization	Second second second second second second second second second second second second second second second second		in an	
23	Insurance	19,973.		19,973.	
24	Other expenses. Itemize expenses not covered above (List miscellaneous expenses on line 24e. If line 24e amount exceeds 10% of line 25, column (A) amount, list line 24e expresses on Schedule 0.)				
	INSTRUCTIONAL MATERIALS	133,292.	133,292.		
b	and a start a start and a start and a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a start a	100,000	200,000		
c	<u>2</u>	2.		X	
d					
	All other expenses	290,910.	20.764.	270.146.	
	Total functional expenses. Add lines 1 through 24e	2,765,621.	1,963,310.	742.986.	59,325
	Joint oosts. Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation.				57,525
_	Check here - Ffollowing SCP 98-2 (ASC 938-725)				Form 990 (201

m	990 (Balance Sheet SCHOOL			4/-1	901769 Page 1
ar	τx					
_		Check If Schedule O contains a response or not	e to any line in this Part X			
				(A) Beginning of year		(D) End of year
	1	Cash - non-interest-bearing		176.764.	1	476.274
	2	Savings and temporary cash investments			2	
		Pledges and grants receivable, net			3	447,414
	4	Accounts receivable, net			4	117,111
		Loans and other receivables from any current or			-	
	0	trustee, key employee, creator or founder, subst				
					5	
	-	controlled entity or family member of any of the			0	
	ь	Loans and other receivables from other disqualt				
	-	under section 4958(f)(1)), and persons described			6	
	7	Notes and loans receivable, net			-	
	8	inventories for sale or use			8	14,034
٠.	9	Prepaid expenses and deferred charges	1 1		9	14,034
	10a	Land, buildings, and equipment: cost or other				
		basis. Complete Part VI of Schedule D				
		Less: accumulated depreciation			10c	
	11	Investments - publicly traded securities			11	
	12	Investments - other securities. See Part IV, line 1			12	
	13	Investments - program-related. See Part IV, line			13	
	14	Intangible assets		-	14	
	16	Other assets. See Part IV, line 11		16		
	16	Total assets. Add lines 1 through 15 (must equ	al line 33)	248,983.	16	937,722
	17	Accounts payable and accrued expenses	105,422.	17	91,981	
	18	Grants payable			18	
	19	Deferred revenue		<u>0</u>	19	75,000
	20	Tax-exempt bond liabilities			20	
	21	Escrow or custodial account liability. Complete I	Part IV of Schedule D		21	
2	22	Loans and other payables to any current or form	er officer, director,			
1		trustee, key employee, creator or founder, subst			1.000	
		controlled entity or family member of any of the	se persons		22	
2	23	Secured mortgages and notes payable to unrela	ted third parties		23	
	24	Unsecured notes and loans payable to unrelated	i third parties		24	345,495
	25	Other liabilities (including federal income tax, pa	yables to related third			
		parties, and other liabilities not included on lines	17-24). Complete Part X			
		of Schedule D			25	51000
	26	Total liabilities. Add lines 17 through 25		105,422.	26	512,476
		Organizations that follow FASE ASC 958, che	ck here 🕨 🛣			
		and complete lines 27, 28, 32, and 33.				
ŧ.	27	Net assets without donor restrictions		143,561.	27	158,533
Dauricas	28	Net assets with donor restrictions		28	266,713	
2		Organizations that do not follow FASE ASC 9				
2		and complete lines 29 through 33.				
5	29	Capital stock or trust principal, or current funds			29	
	30	Paid-in or capital surplus, or land, building, or eq			30	
	31	Retained earnings, endowment, accumulated in			31	
	32	Total net assets or fund balances			32	425,246
c	-	Total liabilities and net assets/fund balances		248,983.	33	937,722

\$32911 01-20-20		
	11	
21000510 131839 213-118280-00	2019.05094 ROOTED SCHOOL	213-1181

Calesdar year (ar fiscal year keyning in)	fails to qualify under the tests	listed below, pie:	ase complete Part	III.)			
1 offic gards, controlutions, and membership fees received. (Do not include any "unusual grants.") 2 Tax revenues level for the eight tation's benefician of the pairs in the tation's benefician of the pairs in the services of activities membership fees received on its behalf 3 To tax. Add lines 1 brough 3 4 To tax. Add lines 1 brough 3 5 To tax add lines 1 brough 3 5 To tax add lines 1 brough 3 5 To tax add lines 1 brough 3 5 To tax add lines 1 brough 3 5 To tax add lines 1 brough 3 5 To tax add lines 1 brough 3 5 To tax add lines 1 brough 3 5 To tax add lines 1 brough 3 5 To tax add lines 1 brough 3 5 To tax add lines 1 brough 3 5 To tax add lines 1 brough 3 5 To tax add lines 1 brough 3 5 To tax add lines 1 brough 3 5 To tax add lines 1 brough 3 5 To tax add lines 1 brough 3 5 To tax add lines 1 brough 3 5 To tax add lines 1 brough 3 5 To tax add lines 1 brough 3 5 To tax add lines 1 brough 3 5 To tax add lines 1 brough 3 5 To tax add lines 1 brough 3 5 To tax add lines 1 brough 3 5 To tax add lines 1 brough 3 5 To tax add lines 1 brough 3 5 To tax add lines 1 brough 3 5 To tax add lines 1 brough 3 5 To tax add lines 1 brough 3 5 To tax add lines 1 brough 3 5 To tax add lines 1 brough 3 5 To tax add lines 1 brough 3 5 To tax add lines 1 brough 3 5 To tax add lines 1 brough 3 5 To tax add lines 1 brough 3 5 To tax add lines 1 brough 3 5 To tax add lines 1 brough 3 5 To tax add lines 1 brough 3 5 To tax add lines 1 brough 3 5 To tax add lines 1 brough 3 5 To tax add lines 1 brough 3 5 To tax add lines 1 brough 3 5 To tax add lines 1 brough 3 5 To tax add lines 1 brough 3 5 To tax add lines 1 brough 3 5 To tax add lines 1 brough 3 5 To tax add lines 1 brough 3 5 To tax add lines 1 brough 3 5 To tax add lines 1 brough 3 5 To tax add lines 1 brough 3 5 To tax add lines 1 brough 3 5 To tax add lines 1 brough 3 5 To tax add lines 1 brough 3 5 To tax add lines 1 brough 3 5 To tax add lines 1 brough 3 5 To tax add lines 1 brough 3 5 To tax add lines 1 brough 3 5 To tax add lines 1 brough 3 5 To tax add lines 1 broug	Section A. Public Support				10		11 m
2 Tax revenues levide for the organization is behavior Image: constraint of the pair is a constraint of the organization without charge is the organization without charge is the organization without charge is the organization without charge is the organization without charge is the organization without charge is the organization without charge is the organization without charge is the organization without charge is the organization without charge is the organization without charge is the organization without charge is the organization without charge is the organization without charge is the organization without charge is the organization without charge is the organization without charge is the organization without charge is the organization without charge is the organization without charge is the organization without charge is the organization without charge is the organization without charge is the organization without charge is the organization without charge is the organization without charge is the organization without charge is the organization without charge is the organization without charge is the organization without charge is the organization without charge is the organization without charge is the organization without charge is the organization without charge is the organization without charge is the organization without charge is the organization without charge is the organization without charge is the organization without charge is the organization without charge is the organization without charge is the organization without charge is the organization without charge is the organization without charge is the organization without charge is the organization without charge is the organization without charge is the organization without charge is the organization without charge is the organization without charge is the organization without charge is the organization without charge is the organizatis and organize the organization witho without charg	1 Gifts, grants, contributions, and membership fees received. (Do not	(a) 2015	(b) 2016	(c) 2017	(d) 2018	(e) 2019	(f) Total
furnished by a governmental unit to the organization without charge	2 Tax revenues levied for the organ- ization's benefit and either paid to						
6 The portion of total contributions by each person (other than a governmental will or publicly supported organization) included on line 1 that success 2% of the amount shown on line 11, column (f)	furnished by a governmental unit to						
Section B. Total Support alexfar year (ar fisal year keginning in) ▶ (a) 2015 (b) 2016 (c) 2017 (d) 2018 (e) 2019 (f) Total A mounts from line 4 (a) 2015 (b) 2016 (c) 2017 (d) 2018 (e) 2019 (f) Total 8 Gross income from interest, dividends, payments received on securities loans, rents, noyaties, and income from unrelated business activities, whether on the business is regularly carried on	6 The portion of total contributions by each person (other than a governmental unit or publicly supported organization) included on line 1 that exceeds 2% of the amount shown on line 11,						
7 Amounts from line 4							
8 Gross income from interest, dividends, payments received on securities loans, rents, royaltes, and income from interest, bit income from interests, and income from interests, and income from interests, and income from interests, and income from interests, and income from interests, and income from interests, and income from interest, and into prevaluation from the fraction of the organization bits interest, and into prevaluation fraction interest, and into prevealuation fraction interest, and into prevaluation fraction into the organization and into prevaluation interest, and into prevaluation fraction interest, and into prevaluation meets the fraction into prevaluation interest into prevaluation into the cha abox on line 13, 154, or 156, and line 14 is 10% or more, and if the organization meets the fraction during interest interest interest interest interest interest interest interest interest interest interest interest interest interest interest interest interest interest interest interest interest interest interest interest interest interest interest interest interest interest interest interest interest interest interest		(a) 2015	(b) 2016	(c) 2017	(d) 2018	(e) 2019	(f) Total
9 Het income from unrelated business activities, whether or not the business is regularly carted on the business is regularly carted on the difference on the business is regularly carted on the sale of capital activities, whether or not the sale of capital activities, whether or not the sale of capital activities, whether or not the sale of capital activities, whether or not the sale of capital activities, whether or not the sale of capital activities, whether or not the sale of capital activities, etc. bee instructions) 10 Other income. Do not include gain or loss from the organization of first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and stop here. 12 Extension of the organization of the organization of first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and stop here. 14 Public support percentage from 2018 Schedule A, Part II, line 14 15 Public support test - 2019. If the organization did not check the box on line 13, and line 14 is 33 1/3% or more, check this box and stop here. The organization dualities as a publicly supported organization. 17 10% - facts-and-chroumstances test - 2019. If the organization did not check a box on line 13, T6a, or 16a, and line 14 is 10% or more, and if the organization dualities as a publicly supported organization. 17 10% - facts-and-chroumstances test - 2019. If the organization did not check a box on line 13, T6a, or 16a, and line 14 is 10% or more, and if the organization meets the "facts and chroumstances" test, check this box and stop here. The organization meets the "facts and chroumstances" test, check this box and stop here. 10 10% - facts-and-chroumstances test - 2019. If the organization did not check	8 Gross income from interest, dividends, payments received on securities loans, rents, royalties,						
10 Other Income. Do not Include gain or loss from the sale of capital assets (Explain In Part V). 11 Total support. Add lines 7 drough 10 12 Gross receipts from related activities, etc. (see instructions) 12 Gross receipts from related activities, etc. (see instructions) 12 Gross receipts from related activities, etc. (see instructions) 12 Gross receipts from related activities, etc. (see instructions) 12 Difference 13 First five years. If the Form 90 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c(3)) organization check this box and stop here Difference 26/CIGN C. Computation On P Public Stypport Percentage 14 Public support percentage two 2019 (line 6, column (f) divided by line 11, column (f) 15 Public support test - 2018. If the organization due on the tax and the 14 is 33 1/3% or more, check this box and stop here. The organization qualifies as a publicly supported organization 16 34 1/3* support test - 2018. If the organization due on the check a box on line 13 or 16a, or 16b, and line 14 is 10% or more, and if the organization neganization exclumentation qualifies as a publicly supported organization 17a 10* facts-and-chrcumstances test 2019. If the organization due to check a box on line 13, 16a, or 16b, and line 14 is 10% or more, and if the organization meets the "facts-and-chrcumstances" test, chec	9 Net income from unrelated business activities, whether or not the						
11 Total support. Add ines 7 through 10 12 12 Gross receipts from related activities, etc. (see instructions) 12 12 Briss thre years. If the Form 90 is for the organization's first, second, third, fourth, or fifth tax year as a section 5016(33) 0 Briss thre years. If the Form 90 is for the organization's first, second, third, fourth, or fifth tax year as a section 5016(33) 0 Briss thre years. If the Form 90 is for the organization of Public Support Percentage 14 Public support percentage tor 2019 (ine 6, column (f) divided by line 11, column (f) 14 15 Public Support test - 2018. If the organization did not check the box on line 13, and line 14 is 33 1/3% or more, check this box and stop here. The organization dualities as a publicly support test - 2018. If the organization did not check a box on line 13 or 16a, and line 15 is 33 1/3% or more, check this box and stop here. The organization qualifies as a publicly supported organization. Image: Column 14 is 10% or more, check this box and stop here. Explain the 14 is 10% or more, and if the organization meets the "taxts and-circumstances" test, check this box and stop here. Explain the 14 is 10% or more, and if the organization meets the "taxts and-circumstances" test. The organization qualifies as a publicly supported organization 173 10% - facts-and-circumstances" test. The organization qualifies as a publicly supported organization meets the "taxts and-circumstances" test, check this box and stop here. Explain the 14 is 10% or more, and if the organization meets the "taxts-and-circumstances" test 2018. If the organiz	10 Other income. Do not include gain or loss from the sale of capital						
13 First five years. If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization.check flip box and stop here Section C. Computation on P Public Support Percentage 14 Public support percentage for 2019 [line 6, column (f) divided by line 11, column (f)] 15 Public support percentage for 2019 [line 6, column (f) divided by line 11, column (f)] 16 So 31 /3% support test - 2019. If the organization did not check the box on line 13, and line 14 is 33 1/3% or more, check this box and stop here. The organization dualities as a publicly supported organization 17 10% - facts-and-chroumstances test - 2019. If the organization did not check a box on line 13 or 16a, and line 15 is 33 1/3% or more, check this box and stop here. The organization qualifies as a publicly supported organization 17 10% - facts-and-chroumstances test - 2019. If the organization did not check a box on line 13, 16a, or 16a, and line 14 is 10% or more, and if the organization meets the "facts and chroumstances" test, check this box and stop here. Explain line 14 is 10% or more, and if the organization qualifies as a publicly supported organization 17 10% - facts-and-chroumstances test - 2019. If the organization qualifies as a publicly supported organization 18 the organization meets the "facts and-chroumstances" test, check this box and stop here. Explain line 14 is 10% or more, and if the organization qualifies as a publicly supported organization 19 the organization meets the "facts-and-chroumstances" test, check this box and stop here. Explain line 15 is 10% or more, and if the organization meets the "facts-and-chrou	11 Total support. Add lines 7 through 10						
GetConf C. Computation of Public Support Percentage If Public support percentage for 2019 (ine 6, column (f) divided by line 11, column (f) If I I I I I I I I I I I I I I I I		-		d, fourth, or fifth ta	x year as a sectio		
6 Public support percentage from 2018 Schedule A, Part II, line 14 16 16 16 16 16 173's support test - 2019. If the organization did not check the box on line 13, and line 14 is 33 1/3% or more, check this box and stop here. The organization qualifies as a publicly supported organization b 33 1/3% is puport test - 2018. If the organization did not check a box on line 13 or 16a, and line 15 is 33 1/3% or more, check this box and stop here. The organization qualifies as a publicly supported organization a 10% -facts-sub-critecumstances test - 2019. If the organization did not check a box on line 13, 16a, or 16b, and line 14 is 10% or more, and if the organization meets the 'facts-and-critecumstances' test, check this box and stop here. Explain h Part VI how the organization b 10% -facts-and-critecumstances test - 2018. If the organization qualifies as a publicly supported organization b 10% -facts-and-critecumstances test - 2018. If the organization qualifies as a publicly supported organization meets the 'facts-and-critecumstances' test, check this box and stop here. Explain h Part VI how the organization b 10% -facts-and-critecumstances test - 2018. If the organization qualifies as a publicly supported organization b 10% -facts-and-critecumstances' test, check this box and stop here. Explain h Part VI how the	organization, check this box and stor ection C. Computation of Publi	c Support Pe	rcentage				
63 83 1/3% support test - 2019. If the organization did not check the box on line 13, and line 14 is 33 1/3% or more, check this box and stop here. The organization qualifies as a publicly supported organization Image: Support test - 2018. If the organization did not check a box on line 13 or 16a, and line 15 is 33 1/3% or more, check this box and stop here. The organization qualifies as a publicly supported organization Image: Support test - 2018. If the organization did not check a box on line 13 or 16a, and line 14 is 10% or more, and if the organization meets the "facts-and-circumstances" test, check this box and stop here. Explain h Part VI how the organization meets the "facts-and-circumstances test - 2018. If the organization did not check a box on line 13, 16a, 16b, or 17a, and line 15 is 10% or b 10% -facts-and-circumstances test - 2018. If the organization did not check a box on line 13, 16a, 16b, or 17a, and line 15 is 10% or more, and if the organization meets the "facts-and-circumstances" test, check this box and stop here. Explain h Part VI how the more, and if the organization meets the "facts-and-circumstances" test, check this box and stop here. Explain h Part VI how the							
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7a 10% -facts-and-circumstances test - 2019. If the organization did not check a box on line 13, 16a, or 16b, and line 14 is 10% or more, and if the organization meets the "facts-and-circumstances" test, check this box and stop here. Explain in Part VI how the organization meets the "facts-and-circumstances" test. The organization qualifies as a publicly supported organization b 10% -facts-and-circumstances test - 2018. If the organization did not check a box on line 13, 16a, 16b, or 17a, and line 15 is 10% or more, and if the organization meets the "facts-and-circumstances" test, check this box and stop here. Explain in Part VI how the	b 33 1/3% support test - 2018. If the o	organization did n	ot check a box on	ine 13 or 16a, and			
more, and if the organization meets the "facts-and-circumstances" test, check this box and stop here. Explain in Part VI how the	7a 10% -facts-and-circumstances test and if the organization meets the "fac	- 2019. If the or	ganization did not ices" test, check th	check a box on lin is box and stop i	ere. Explain in Pa	art VI how the organ	or more,
	more, and if the organization meets th	e "facts-and-circu	imstances" test, cl	eck this box and	stop here. Expla	in in Part VI how the	
18 Private foundation. If the organization did not check a box on line 13. 16a. 16b. 17a. or 17b. check this box and see instructions PO-EZI 2019 Schedule A (Form 990 or 990-EZI) 2019	8 Private foundation. If the organizatio	n did not check a	box on line 13, 16	a. 16b. 17a. or 17			
	2022 08-25-19						
14	0510 131839 213-11828	000	2010	05094 ROO	TED SCHOO	τ.	213-118

2	Part III Support Schedule for O	-					
-	Complete only If you checked oughty under the tests listed by Section A. Public Support			organization failed	to qualify under F	art II. If the organi	zation fails to
	Calendar year (or fisoal year beginning in) 🅨	(a) 2015	(b) 2016	(c) 2017	(d) 2018	(e) 2019	(f) Total
-	1 Gifts, grants, contributions, and	(4) 2013	10/2010	10/2011	10/2010	(0) 2015	
	membership fees received. (Do not						
	include any "unusual grants.")			· · · · · ·		2	S
_	2 Gross receipts from admissions,						
	merchandise sold or services per-						
	formed, or facilities furnished in any activity that is related to the						
	organization's tax-exempt purpose		-				
	3 Gross receipts from activities that			· · · · · · · · · · · · · · · · · · ·			
	are not an unrelated trade or bus-						
	Iness under section 513		5				2
_	4 Tax revenues levied for the organ-						
	ization's benefit and either paid to						
	or expended on its behalf						
	6 The value of services or facilities		-	2		8	25 - C
	furnished by a governmental unit to						1
	the organization without charge						
	6 Total. Add lines 1 through 5			3			8
	7a Amounts included on lines 1, 2, and						
	3 received from disqualified persons		-	· · · · · ·			
_	b Annumbs included on lines 2 and 3 received						
28	from other than disquilled persons that succeed the grapher of \$2,000 or 7% of the						
	amount on line 13 for the year						
	c Add lines 7a and 7b						
	8 Public support. Selfacthe?chmiles() Section B. Total Support			2			
-	Calendar year (or fisoal year beginning in) 🕨	(a) 2015	(b) 2016	(c) 2017	(d) 2018	(e) 2019	(f) Total
	9 Amounts from line 6						
-	10a Gross income from interest, dividends, payments received on						
	securities loans, rents, royalties, and income from similar sources						
	b Unrelated business taxable income						
_	(less section 511 taxes) from businesses						
_	acquired after June 30, 1975		-			-	4
	c Add lines 10a and 10b						3
L	11 Net income from unrelated business activities not included in line 10b.						
-	whether or not the business is						
<u>96</u>	regularly carried on 12 Other Income. Do not include gain					-	
96	or loss from the sale of capital					1	
1	assets (Explain in Part VL)			<u> </u>		-	25
1	13 Total support. (Add lines 0, 10c, 11, and 12.)						
1	14 First five years. If the Form 990 is for	the organization's	s first, second, thin	d, fourth, or fifth ta	ax year as a sectio	n 501(c)(3) organi:	ation,
1	check this box and stop here	c Support Per	contago				
	15 Public support percentage for 2019 (I			all and all		45	1.5
1	16 Public support percentage for 2019 (i 16 Public support percentage from 2018			countrin (t)		16	
	Section D. Computation of Inves	10					
	17 Investment income percentage for 20					17	
	18 Investment Income percentage from 2					18	100010
1	19a 33 1/3% support tests - 2019. If the						
9	more than 33 1/3%, check this box an						
	b 33 1/3% support tests - 2018. If the	organization did n	ot check a box on	line 14 or line 19a	, and line 16 is m	ore than 33 1/3%,	and
	line 18 is not more than 33 1/3%, cher	ck this box and st	op here. The orga	nization qualifies a	as a publicly supp	orted organization	
	20 Private foundation. If the organization		box on line 14, 19	a. or 19b. check th		structions hedule A (Form 95	

	1 990 (2019) ROOTED SCHOOL	47-1	901769	Pa	02 .
99	rt XI Reconciliation of Net Assets				
_	Check If Schedule O contains a response or note to any line in this Part XI				
1	Total revenue (must equal Part VIII, column (A), line 12)	1	3,04	7,3	06
2	Total expenses (must equal Part IX, column (A), line 25)	2	2,76	5,6	21
3	Revenue less expenses. Subtract line 2 from line 1	3	28	1.6	85
4	Net assets or fund balances at beginning of year (must equal Part X. line 32, column (A))	4	14	3,5	61
5	Net unrealized gains (losses) on investments	6			
5	Donated services and use of facilities	6			
7	investment expenses	7			
8	Prior period adjustments	8			
9	Other changes in net assets or fund balances (explain on Schedule O)	9			0
	Net assets or fund balances at end of year. Combine lines 3 through 9 (must equal Part X, line 32.				-
	column (B)	10	42	5.2	46
	Accounting method used to prepare the Form 990: Cash X Accrual Other	0.	- [Yes	N
			23	Yes	
	If the organization changed its method of accounting from a prior year or checked "Other," explain in Schedule Were the organization's financial statements compiled or reviewed by an independent accountant? If "Yes," check a box below to indicate whether the financial statements for the year were compiled or reviewed		23	Yes	X
23	If the organization changed its method of accounting from a prior year or checked "Other," explain in Schedule Were the organization's financial statements compiled or reviewed by an independent accountant? If "Yes," check a box below to indicate whether the financial statements for the year were compiled or reviewed separate basis, consolidated basis, or both:	l on a		Yes	
23	If the organization changed its method of accounting from a prior year or checked "Other," explain in Schedule Were the organization's financial statements compiled or reviewed by an independent accountant? If "Yes," check a box below to indicate whether the financial statements for the year were compiled or reviewed separate basis, consolidated basis, or both: Separate basis Consolidated basis Doth consolidated and separate basis	l on a			
b	If the organization changed its method of accounting from a prior year or checked "Other," explain in Schedule Were the organization's financial statements compiled or reviewed by an independent accountant? If "Yes," check a box below to indicate whether the financial statements for the year were compiled or reviewed separate basis, consolidated basis, or both: Separate basis Consolidated basis Both consolidated and separate basis Were the organization's financial statements audited by an independent accountant? If "Yes," check a box below to indicate whether the financial statements for the year were audited on a separate consolidated basis, or both:	i on a e basis, e audit,	_2b		
b	If the organization changed its method of accounting from a prior year or checked "Other," explain in Schedule Were the organization's financial statements compiled or reviewed by an independent accountant? If "Yes," check a box below to indicate whether the financial statements for the year were compiled or reviewed separate basis, consolidated basis, or both: Both consolidated basis, or both: If "Yes," check a box below to indicate whether the financial statements for the year were audited on a separate consolidated basis, or both: If "Yes," check a box below to indicate whether the financial statements for the year were audited on a separate consolidated basis, or both: If "Yes," check a box below to indicate whether the financial statements for the year were audited on a separate consolidated basis, or both: If "Yes," check a box below to indicate whether the financial statements for the year were audited on a separate consolidated basis, or both: If "Yes," check a box below to indicate whether the financial statements for the year were audited on a separate consolidated basis, or both: If "Yes," check a box below to indicate whether the financial statements for the year were audited on a separate consolidated basis, or both: If "Yes," check a box below to indicate whether the financial statements for the year were audited on a separate consolidated basis, or both: If "Yes," check a box below to indicate whether the financial statements for the year were audited on a separate consolidated basis, or both: If "Yes," to list 2 or 20, does the organization have a committee that assumes responsibility for oversight of the "Yes" to list 2 or 20, does the organization have a committee that assumes responsibility for oversight of the "Yes" to list 2 or 20, does the organization have a committee that assumes responsibility for oversight of the "Yes" to list 2 or 20, does the organization have a committee that assumes the possibility for oversight of the "Yes" to list 2 or 20, does the organization have a committee t	l on a e basis, e audit,	_2b	x	
b	If the organization changed its method of accounting from a prior year or checked "Other," explain in Schedule Were the organization's financial statements complied or reviewed by an independent accountant? If "Yes," check a box below to indicate whether the financial statements for the year were complied or reviewed separate basis, consolidated basis, or both: Were the organization's financial statements audited by an independent accountant? If "Yes," check a box below to indicate whether the financial statements for the year were audited on a separate consolidated basis, or both: Xere the organization's financial statements audited by an independent accountant? If "Yes," check a box below to indicate whether the financial statements for the year were audited on a separate consolidated basis, or both: Xere the organization's financial statements and selection of an independent accountant? If "Yes," to line 2a or 2b, does the organization has a selection of an independent accountant?	i on a e basis, e audit, edule O.	_2b	x	
b	If the organization changed its method of accounting from a prior year or checked "Other," explain in Schedule Were the organization's financial statements compiled or reviewed by an independent accountant? If "Yes," check a box below to indicate whether the financial statements for the year were compiled or reviewed separate basis	i on a e basis, e audit, eduie O. ugie Audit	_2b	x	x
b	If the organization changed its method of accounting from a prior year or checked "Other," explain in Schedule Were the organization's financial statements compiled or reviewed by an independent accountant? If "Yes," check a box below to indicate whether the financial statements for the year were compiled or reviewed separate basis, consolidated basis, or both: Both consolidated and separate basis Were the organization's financial statements audited by an independent accountant? If "Yes," check a box below to indicate whether the financial statements for the year were audited on a separate consolidated basis, or both: Both consolidated basis Both consolidated basis If "Yes," the state basis Consolidated basis If "Yes," the state basis Consolidated basis If "Yes," the state basis If "Yes," the state basis If "Yes," the state basis If "Yes," the state basis If "Yes," the state basis If "Yes," the state basis If "Yes," the state basis If "Yes," the organization statements and selection of an independent accountant? If "Yes," the organization changed either its oversight process or selection process during the tax year, explain on Sch	i on a e basis, e audit, edule O. sgle Audit	2b	x	

	(Form 990 or 990-EZ)	Complete If the organ 49	rity Status an ization is a section 60: 47(a)(1) nonexempt cha	1(c)(3) orga aritable tru	anization ist.		2019
6.	Department of the Treasury Internal Revenue Service		Attach to Form 990 or I v/Form990 for Instructi			ntormation	Open to Public Inspection
1.	Name of the organization		of the most of the of the		C MIC 2C II		ployer Identification num
5.		OOTED SCHOOL				1.00	47-1901769
1.	Part I Reason for Pu	blic Charity Status	All organizations must c	omplete thi	is part.) Se	ee instructions.	
51. 0. 46. X X 2019)	The organization is not a private 1 A church, convention 2 X A school described i 3 A hospital or a comp 4 A medical executed i 5 A noganization oper 5 C An organization oper 5 C An organization that 5 C A tederal, state, or to 7 An organization that 6 C A tederal, state, or to 7 C An organization that 6 C A tederal, state, or to 7 C An organization that 8 C A organization that 8 C A organization flat 10 An organization flat 11 A no organization of 12 An organization organization organization organization organization organization organization organization. You 10 C Type II. A support 11 that is not function 12 C Type III functional 13 Type III non-funct 14 Type III non-funct 15 C Type III non-funct 16 C Type III non-funct 17 C Type III non-funct 17 C Type III non-funct 17 C Type III non-funct 17 C C Type III non-funct 17 C C Type III non-funct 17 C C Type III non-funct 17 C C Type III non-funct 17 C C Type III non-funct 17 C C C C C C C C C C C C C C C C C C C	a) of churches, or associatis in section 170(b)(11(A)(I)), an section 170(b)(11(A)(I)), arather hospital service org organization operated in co- ated for the benefit of a co (I/V). [Complete Part II.] scicilation (Complete Part II.] science II association (Complete Part II.] in complete Part IV.] in the supporting org u must complete Part IV.] in the supporting org u must complete A supportin in complete A supportin in complete A supportin in complete A supportin in complete A supportin in complete A supportin in complete A supportin in complete A supportin in complete A and a supportin in complete A and a supportin in complete A and a supportin in complete A and a supportin in complete A supportin in complete A and a supportin in complete A and a supportin in complete A and a supportin in complete A and a supportin in complete A and a supportin in complete A and a supportin in complete A and a supportin in complete A and a supportin in complete A and a supportin in complete A and a supportin in complete A and a supportin in complete A and a supportin in complete A and a supportin in complete A and a supportin in complete A and a supportin in complete A and a supportin in complete A and a supportin in complete A and a supportin in complete A and a supportin in complete A and a supportin in complete A and a supportin in complete A and a supportin in complete A and a supportin in complete A and a supportin in complete A and a supportin in complete A and a supportin in complete A and a supportin in complete A and a supportin in complete A and a supportin in complete A and a supportin in complete A and a supportin in complete A and a supportin in complete A and a supportin in complete A and a supportin	For lines 1 through 12, c on of churches described and churches described in s nalization described in s nalization described in s nalization described in s natial part of its support 1 (1)(A)(v). (Complete Para in section 170(b))(1)(A) uitare (see instructions). et an 33 1/3% of its sup ct to certain exceptions, (less section 5111 ax) in vely to the set for public sa vely to the best for public sa vely to the best for public sa upervised, or controlled guilary appoint or elect anization vested in operated bections A and B. I or combolied in connece anization vested in the s Sections A and C. g organization operated south generally must aa	theck only is actively a solution of the sector of the section 170 of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of the sector of th	one boi,] in 1700[0] (b)(1)(A)(0) (b)(1)(A)(0) in sectio ed by a ge ed by a g	1)(A)(). II). an 170(b)(1)(A)(III). overnmental unit de (v). unit or from the gei unction with a land- r, and state of the c ons, membership fe n 83 1/8% of its sug irred by the organiza 09(a)(4). See section 609(a) s 12e, 12f, and 12g, anization(a), typical closes or trustees of ed organization(a), typical constructionally limit organizations and an an an an an an an an an an an an an	escribed in meral public described in organic college college or es, and gross receipts fro opport from gross investime ation after June 80, 1975. At the purposes of one or ((3). Check the box in ally by giving the supporting by having e supported e supported egrated with, wganization(s) titentiveness
		orted organizations	nally integrated support of organization(s). (III) Type of organization (described on lines 1-10 above (see instructions)).		No	(v) Amount of more support (see instruct	
	functionally integra f Enter the number of supp g Provide the following infor (i) Name of supported	orted organizations	d organization(s). (III) Type of organization (described on lines 1-10	anima terena	a accession of the		
	functionally integra f Enter the number of supp <u>9. Provide the following infor (0) Name of supported</u> organization	orted organizations	d organization(s). (III) Type of organization (described on lines 1-10	anima terena	a accession of the		
	functionally integra f Enter the number of supp g Provide the following infor (i) Name of supported	orted organizations mation about the sunport (II) EN	d ormanization(s). (iii)Type of organization (described on lines 1-10 above See instructional)	In the second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second se	No	support (see instruct	Store) support (see instruction)

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rt IV Supporting Organizations		Part IV Supporting Organizations (continued)	
(Complete only if you checked a box in line 12 on Part I. If you checked 12a of Part	t I, complete Sections A		Yes
and B. If you checked 12b of Part I, complete Sections A and C. If you checked 12	2c of Part I, complete	11 Has the organization accepted a gift or contribution from any of the following persons?	
Sections A, D, and E. If you checked 12d of Part I, complete Sections A and D, and	d complete Part V.)	a A person who directly or indirectly controls, either alone or together with persons described in (b) and (c)	
tion A. All Supporting Organizations		below, the governing body of a supported organization?	11a
allela allela	Yes No.	b A family member of a person described in (a) above?	110
Are all of the organization's supported organizations listed by name in the organization's (governing	c A 35% combrolled entity of a person described in (a) or (b) above? If "Yes" to a, b, or c, provide detail in Part VI.	11c
documents? If "No," describe in Part VI how the supported organizations are designated.	If designated by	Section B. Type I Supporting Organizations	100 a 100 a 100
class or purpose, describe the designation. If historic and continuing relationship, explain.	1		Yes
Did the organization have any supported organization that does not have an IRS determin	nation of status	1 Did the directors, trustees, or membership of one or more supported organizations have the power to	
under section 509(a)(1) or (2)? If "yes," explain in Part VI how the organization determined		regularly appoint or elect at least a majority of the organization's directors or trustees at all times during the	
organization was described in section 509(a)(1) or (2).	2	tax year? If "No," describe in Part VI how the supported organization(s) effectively operated, supervised, or	
Did the organization have a supported organization described in section 501(c)(4), (5), or ((6)? W "Ves " answer	controlled the organization's activities. If the organization had more than one supported organization,	
(b) and (c) below.	3a	describe how the powers to appoint and/or remove directors or trustees were allocated among the supported	
Did the organization confirm that each supported organization qualified under section 501	1(c)(4) (5) or (6) and	organizations and what conditions or restrictions, if any, applied to such powers during the tax year.	1
satisfied the public support tests under section 509(a)(2)? If "Yes," describe in Part VI wi		2 Did the organization operate for the benefit of any supported organization other than the supported	
organization made the determination.	3b	organization(s) that operated, supervised, or controlled the supporting organization? If "Yes," explain in	
Did the organization ensure that all support to such organizations was used exclusively fo		Part VI how providing such benefit carried out the purposes of the supported organization(s) that operated,	
purposes? If "Yes," explain in Part VI what controls the organization put in place to ensure		supervised, or controlled the supporting organization.	2
Was any supported organization not organized in the United States ("foreign supported or		Section C. Type II Supporting Organizations	
"Yes," and if you checked 12a or 12b in Part I, answer (b) and (c) below.	42		Yes
Fires, and it you checked 12a or 12b in Part I, answer (b) and (c) below. Did the organization have ultimate control and discretion in deciding whether to make gra-	the foreign	1 Were a majority of the organization's directors or bustees during the tax year also a majority of the directors	Tes
supported organization? If "yes," describe in Part VI how the organization had such control	-	1 were a majority or the organization's directors or dustees during the tax year also a majority or the directors or bustees of each of the organization's supported organization(s)? If "No." describe in Part VI how control	
despite being controlled or supervised by or in connection with its supported organization:		or management of the supporting organization was vested in the same persons that controlled or managed	
Did the organization support any foreign supported organization that does not have an IR		the supported organizationis. Section D. All Type III Supporting Organizations	1
under sections 501(c)(3) and 509(a)(1) or (2)? If "Yes," explain in Part VI what controls the	-	Section D. All Type in Supporting Organizations	
to ensure that all support to the foreign supported organization was used exclusively for se			Yes
purposes.	4c	1 Did the organization provide to each of its supported organizations, by the last day of the fifth month of the	
Did the organization add, substitute, or remove any supported organizations during the ta		organization's tax year, (i) a written notice describing the type and amount of support provided during the prior tax	
answer (b) and (c) below (if applicable). Also, provide detail in Part VI, including (i) the name		year, (i) a copy of the Form 990 that was most recently filed as of the date of notification, and (ii) copies of the	
numbers of the supported organizations added, substituted, or removed; (ii) the reasons for	r each such action;	organization's governing documents in effect on the date of notification, to the extent not previously provided?	1
(III) the authority under the organization's organizing document authorizing such action; and	d (h) how the action	2 Were any of the organization's officers, directors, or trustees either () appointed or elected by the supported	
was accomplished (such as by amendment to the organizing document).	<u>6a</u>	organization(s) or (II) serving on the governing body of a supported organization? If "No," explain in Part VI how	
Type I or Type II only. Was any added or substituted supported organization part of a cla		the organization maintained a close and continuous working relationship with the supported organization(s).	2
designated in the organization's organizing document?	6b	3 By reason of the relationship described in (2), did the organization's supported organizations have a	
Substitutions only. Was the substitution the result of an event beyond the organization's	s control? 5c	significant voice in the organization's investment policies and in directing the use of the organization's	
Did the organization provide support (whether in the form of grants or the provision of ser	vices or facilities) to	income or assets at all times during the tax year? If "yes," describe in Part VI the role the organization's	
anyone other than ()) its supported organizations, (II) individuals that are part of the charita	able class	supported organizations played in this regard.	3
benefited by one or more of its supported organizations, or (II) other supporting organizat	tions that also	Section E. Type III Functionally Integrated Supporting Organizations	
support or benefit one or more of the filing organization's supported organizations? # "Ye	es," provide detail in	1 Check the box next to the method that the organization used to satisfy the Integral Part Test during the year (see Instru	(ctions).
Part VI.	6	a The organization satisfied the Activities Test. Complete line 2 below.	
Did the organization provide a grant, loan, compensation, or other similar payment to a su	ubstantial contributor	b The organization is the parent of each of its supported organizations. Complete line 3 below.	
(as defined in section 4958(c)(3)(C)), a family member of a substantial contributor, or a 35		c 🔲 The organization supported a governmental entity. Describe in Part VI how you supported a government entity (see instructions).
regard to a substantial contributor? If "Yes," complete Part I of Schedule L (Form 990 or S		2 Activities Test. Answer (a) and (b) below.	Yes
Did the organization make a loan to a disgualified person (as defined in section 4958) not		a Did substantially all of the organization's activities during the tax year directly further the exempt purposes of	
If "Yes," complete Part I of Schedule L (Form 990 or 990-E2).	8	the supported organization(s) to which the organization was responsive? If "Yes," then in Part VI identify	
Was the organization controlled directly or indirectly at any time during the tax year by on	e or more	those supported organizations and explain how these activities directly furthered their exempt purposes,	
disqualified persons as defined in section 4946 (other than foundation managers and orga		how the organization was responsive to those supported organizations, and how the organization determined	
In section 509(a)(1) or (2))? If "yes," provide detail in Part VI.	9a	that these activities constituted substantially all of its activities.	2a
Did one or more disqualified persons (as defined in line 9a) hold a controlling interest in an		 b Did the activities described in (a) constitute activities that, but for the organization's involvement, one or more 	
the supporting organization had an interest? If "Yes," provide detail in Part VI.	90	of the organization's supported organization(s) would have been engaged in? If "Yes," explain in Part VI the	
Did a disqualified person (as defined in line 9a) have an ownership interest in, or derive an		reasons for the organization's position that its supported organization(s) would have engaged in these	
from, assets in which the supporting organization also had an interest? If "Yes," provide of		activities but for the organization's involvement.	2b
Was the organization subject to the excess business holdings rules of section 4943 becar		3 Parent of Supported Organizations. Answer (a) and (b) below.	
4943() (regarding certain Type II supporting organizations, and all Type II non-functional)		 a Did the organization have the power to regularly appoint or elect a majority of the officers, directors, or 	
4943() (regarding certain Type II supporting organizations, and all Type III non-functionally supporting organizations)? If "Yes," answer 10b below.	10a	a bid the organization have the power to regularly appoint or elect a majority of the orncers, directors, or trustees of each of the supported organizations? Provide details in Part VI.	3a
			~
Did the organization have any excess business holdings in the tax year? (Use Schedule C	5, PORT 4720, 10	b Did the organization exercise a substantial degree of direction over the policies, programs, and activities of each of its supported organizations? If "Vec" describe in Part VI the mic played by the organization in this regard	
			30
detempine whether the organization had excess husiness holdings i 09-23-19	Schedule A (Form 990 or 990-EZ) 2019		(Form 990 or 990-EZ)

ection A - Adjusted Net Income		(A) Prior Year	(B) Current Year (optional)
1 Net short-term capital gain	1		
2 Recoveries of prior-year distributions	2		
3 Other gross income (see instructions)	3		
4 Add lines 1 through 3.	4		
5 Depreciation and depietion	6		
6 Portion of operating expenses paid or incurred for production or			
collection of gross income or for management, conservation, or			
maintenance of property heid for production of income (see instructions)	6		
7 Other expenses (see instructions)	7		
8 Adjusted Net Income (subtract lines 5, 6, and 7 from line 4)	8		
Section B - Minimum Asset Amount		(A) Prior Year	(B) Current Yea (optional)
1 Aggregate fair market value of all non-exempt-use assets (see			
instructions for short tax year or assets held for part of year):	a second		
a Average monthly value of securities	1a		
b Average monthly cash balances	10		
c Fair market value of other non-exempt-use assets	1c		
d Total (add lines 1a, 1b, and 1c)	1d		
e Discount claimed for blockage or other	10.00		1
factors (explain in detail in Part VI):			
2 Acquisition indebtedness applicable to non-exempt-use assets	2		
3 Subtract line 2 from line 1d.	3		
4 Cash deemed heid for exempt use. Enter 1-1/2% of line 3 (for greater amount, see instructions).	4		
6 Net value of non-exemptuse assets (subtract line 4 from line 3)	6		
6 Multiply line 5 by .035.	6		
7 Recoveries of prior-year distributions	7		
8 Minimum Asset Amount (add line 7 to line 6)	8		
Section C - Distributable Amount			Current Year
1 Adjusted net income for prior year (from Section A, line 8, Column A)	1		
2 Enter 85% of line 1.	2		
3 Minimum asset amount for prior year (from Section B, line 8, Column A)	3		
4 Enter greater of line 2 or line 3.	4		
6 Income tax Imposed in prior year	6		
6 Distributable Amount, Subtract line 5 from line 4, unless subject to			2
emergency temporary reduction (see instructions).	6		

Schedult A (Form 990 or 990-E2) 2019 ROOTED SCHOOL Part V Type III Non-Functionally Integrated 509(a)(3) Supporting Organizations

Schedule A (Form 990 or 990-EZ) 2019

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Part V Type III Non-Functionally Integrated 509(a)(3) Supporting Orga	nizations (continued)	
ection D - Distributions			Current Year
1 Amounts paid to supported organizations to accomplish exer	not ourposes		51 (S 20/ B 1 1 57))
2 Amounts paid to perform activity that directly furthers exempl	t purposes of supported		
organizations, in excess of income from activity	Property of the second		
3 Administrative expenses paid to accomplish exempt purpose	s of supported organizations	8	
4 Amounts paid to acquire exempt-use assets		3	
6 Qualified set-aside amounts (prior IRS approval required)		1	
6 Other distributions (describe in Part VI). See Instructions.			
7 Total annual distributions. Add lines 1 through 6.			
8 Distributions to attentive supported organizations to which th	e organization is responsive		
(provide details in Part VI). See instructions.			
9 Distributable amount for 2019 from Section C, line 6			
0 Line 8 amount divided by line 9 amount			
	(1)	(II)	(111)
ection E - Distribution Allocations (see Instructions)	Excess Distributions	Underdistributions Pre-2019	Distributable Amount for 2019
1 Distributable amount for 2019 from Section C. line 6			
2 Underdistributions, if any, for years prior to 2019 (reason-	1	Q	
able cause required-explain in Part VI). See instructions.		8	
3 Excess distributions carryover, if any, to 2019			
a From 2014		() ()	
b From 2015			
c From 2016			
d From 2017		Ĩ	
e From 2018		11	
f Total of lines 3a through e		0	
g Applied to underdistributions of prior years			
h Applied to 2019 distributable amount		11	
Carryover from 2014 not applied (see instructions)			
Remainder. Subtract lines 3g, 3h, and 3i from 3f.	8	8	
4 Distributions for 2019 from Section D,			
line 7: \$			
a Applied to underdistributions of prior years		8 8	
b Applied to 2019 distributable amount			
c Remainder, Subtract lines 4a and 4b from 4.		8. N	
6 Remaining underdistributions for years prior to 2019, If			
any. Subtract lines 3g and 4a from line 2. For result greater			
than zero, explain in Part VI, See instructions,			
6 Remaining underdistributions for 2019. Subtract lines 3h			
and 4b from line 1. For result greater than zero, explain in			
Part VI. See Instructions.			
7 Excess distributions carryover to 2020. Add lines 3j	2		
and 4c.			
8 Breakdown of line 7:			
a Excess from 2015			
b Excess from 2016			
c Excess from 2017			
d Excess from 2018			
e Excess from 2019	20	22 St.	

Schedule A (Form 990 or 990-EZ) 2019

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bite A (Form 990 or 990-E2) 2019 ROOTED SCHOOL 47-1901769 Page 8 VII Supplemental Information. Provide the explanations required by Part II, Ine 10; Part IV, Ine 17 and 170; Part IV, Ine 12; Part IV, Section A, Ines 1, 2, 30, 5c, 4b, 4c, 5a, 63, 8b, 9c, 11a, 11b, and 11c; Part IV, Section B, Ines 1 and 5; Part IV, Section C, Ine 1; Part IV, Section D, Ines 2 and 3; Part IV, Section E, Ines 1; Part IV, Section D, Ines 1; Part IV, Section D, Ines 1; Part IV, Section D, Ines 1; Part V, Section B, Ine 1; Part V, Section B, Ine 1; Part V, Section D, Ines 1; Part V, Section D, Ines 1; Part V, Section D, Ines 1; Part V, Section D, Ines 1; Part V, Section D, Ines 1; Part V, Section D, Ines 1; Part V, Section D, Ines 1; Part V, Section D, Ines 1; Part V, Section D, Ines 1; Part V, Section D, Ines 1; Part V, Section D, Ines 1; Part V, Section D, Ines 1; Part V, Section D, Ines 1; Part V, Section D, Ines 1; Part V, Section D, Ines 1; Part V, Section D, Ines 1; Part V, Section D, Ines 1; Part V, Section D, Ines 1; Part V, Section D, Ines 1; Part V, Section D, Ines 1; Part V, Section D, Ines 1; Part V, Section D, Ines 1; Part V, Section D, Ines 1; Part V, Section D, Ines 1; Part V, Section D, Ines 1; Part V, Section D, Ines 1; Part V, Section D, Ines 1; Part V, Section D, Ines 1; Part V, Section D, Ines 1; Part V, Section D, Ines 1; Part V, Section D, Ines 1; Part V, Section D, Ines 1; Part V, Section D, Ines 1; Part V, Section D, Ines 1; Part V, Section D, Ines 1; Part V, Section D, Ines 1; Part V, Section D, Ines 1; Part V, Section D, Ines 1; Part V, Section D, Ines 1; Part V, Section D, Ines 1; Part V, Section D, Ines 1; Part V, Section D, Ines 1; Part V, Section D, Ines 1; Part V, Section D, Ines 1; Part V, Section D, Ines 1; Part V, Section D, Ines 1; Part V, Section D, Ines 1; Part V, Section D, Ines 1; Part V, Section D, Ines 1; Part V, Section D, Ines 1; Par	Schedule B (Form 990, 990-EZ, or 990-PF) Department of the Treasury Internal Provense Service	Schedule of Contributors Attach to Form 990, Form 990-EZ, or Form 990-PF. Go to www.krs.gov/Form990 for the latest information.	2019
Section D, lines 5, 6, and 8; and Part V, Section E, lines 2, 5, and 6. Also complete this part for any additional information. (See instructions.)	Name of the organization	n	Employer Identification nu
		ROOTED SCHOOL	47-1901769
	Organization type (chec	ik one):	
	Filers of:	Section:	
	Form 990 or 990-EZ	X 501(c)(3) (enter number) organization	
		4947(a)(1) nonexempt charitable trust not treated as a private foundation	
		527 political organization	
	Form 990-PF	501(c)(3) exempt private foundation	
		4947(a)(1) nonexempt charitable trust treated as a private foundation	
		501(c)(3) taxable private foundation	
		on is covered by the General Rule or a Special Rule.	
	Note: Only a section 50	1(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special	Rule. See Instructions.
	General Rule		
	For an organiza	tion filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions tota	aling \$5,000 or more (in money o
	property) from a	any one contributor. Complete Parts I and II. See instructions for determining a contribu	tor's total contributions.
	Special Rules		
		tion described in section 501(c)(3) filing Form 990 or 990-E2 that met the 33 1/3% supp	
		(1) and 170(b)(1)(A)(v), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 10 sutor, during the year, total contributions of the greater of (1) \$5,000; or (2) 2% of the ar	
		EZ, line 1. Complete Parts I and II.	
		tion described in section 501(c)(7), (8), or (10) filing Form 990 or 990-E2 that received fro	
		ributions of more than \$1,000 exclusively for religious, charitable, scientific, literary, or e nuelty to children or animals. Complete Parts I, II, and III.	ducational purposes, or for the
	For an organiza	tion described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received fro	om any one contributor, during th
		ons exclusively for religious, charitable, etc., purposes, but no such contributions totale er here the total contributions that were received during the year for an exclusively relig	
	purpose. Don't	complete any of the parts unless the General Rule applies to this organization because	e it received nonexclusively
		able, etc., contributions totaling \$5,000 or more during the year	
	but It must answer "No"	n that isn't covered by the General Rule and/or the Special Rules doesn't file Schedule E on Part IV, line 2, of its Form 990; or check the box on line H of its Form 990-EZ or on it et the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).	
	LHA. For Paperwork Red	uction Act Notice, see the Instructions for Form 990, 990-EZ, or 990-FF. Scher	dule & (Form 990, 990-EZ, or 990-P

	rganization		ployer identification number
	D SCHOOL		47-1901769
Part I	Contributors (see Instructions). Use duplicate copies of Part I if addition	onal space is needed.	
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	NEW SCHOOLS VENTURE FUND		Person X Payroll
	1616 FRANKLIN STREET, SECOND FLOOR	\$ 25,000	Noncash
	OARLAND, CA 94612		(Complete Part II for noncash contributions.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
2	PROBONO PUBLICO	_	Person X
	P.O. BOX 531024	\$ 15,000	
	NEW ORLEANS, LA 70153	_	(Complete Part II for noncash contributions.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
3	KELLER FAMILY FOUNDATION		Person X
	1100 POYDRAS STREET, SUITE 1350	\$ 7,000	Payroll Noncash
	NEW ORLEANS, LA 70163	_	(Complete Part II for noncash contributions.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
4	CHARTER SCHOOL GROWTH FUND	_	Person X
	10901 W. 120TH AVE, SUITE 450	\$ 240,000	
	BROOMFIELD, CO 80021	_	(Complete Part II for noncash contributions.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
5	WASHINGTON STATE CHARTER SCHOOLS	_	Person X
	506 2ND AVE, SUITE 630	\$ 20,000	
	SEATTLE, WA 98104	_	(Complete Part II for noncash contributions.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
6	OPPORTUNITY 180	_	Person X
	900 NORTH LAMB BOULEVARD, SUITE 140	\$ 207,000.	-
	LAS VEGAS , NV 89110	_	(Complete Part II for noncash contributions.)
3452 11-0	22	Schedule B (Fo	rm 990, 990-EZ, or 990-PF) (2019)

ne of o	rganization		En	nployer identification number
OTE	D SCHOOL			47-1901769
irt I	Contributors (see instructions). Use duplicate copies of Part I If add	itional space is needed	L	
(a)	(a)	(c		(d)
No.	Name, address, and ZIP + 4 GRANT FROM 4.0 SCHOOLS FOR BASIC	Total cont	ributions	Type of contribution
7	INCOME CASH PILOT PROGRAM	-		Person X Payroll
	612 ANDREW HIGGINS BLVD 3RD FLOOR	\$;	25,000	
	NEW ORLEANS, LA 70130			noncash contributions.)
(a)	(b)	(c)	(d)
No.	Name, address, and ZIP + 4	Total cont		Type of contribution
8	THE MIND TRUST			Person X Payroll
	1630 N. MERIDIAN ST., STE 450	5 3	25,000	
	INDIANAPOLIS, IN 46202			(Complete Part II for noncash contributions.)
(a)	(6)	(c	1	(d)
10.	Name, address, and ZIP + 4	Total cont		Type of contribution
9	PC CHARITABLE FOUNDATION	_		Person X
	191 W NATIONWIDE BLVD STE 300	s	50,000	
	COLOMBUS, OH 43215	-		noncash contributions.)
(a)	(a)	(c		(d)
No.	Name, address, and ZIP + 4	Total cont	ributions	Type of contribution
10	YOUTH FORCE NOLA			Person X Payroll
	1100 POYDRAS STREET, SUITE 1405	_ \$	50,000	
	NEW ORLEANS, LA 70163	-		(Complete Part II for noncash contributions.)
(a)	(a)	(c		(d)
ło.	Name, address, and ZIP + 4	Total cont	ributions	Type of contribution
_		_		Person
				Payroll
	2			Noncash
	<u>*</u>			(Complete Part II for noncash contributions.)
a) (0.	(b) Name, address, and ZIP + 4	(c Total cont		(d) Type of contribution
	<u>×</u>			Person
				Payroll Noncash
		\$		(Complete Part II for
		_		noncash contributions.)
52 11-00	5-19	S	chedule B (F	orm 990, 990-EZ, or 990-PF) (2019)

	(Form 990, 990-EZ, or 990-PF) (2019) ganization		Page 3 Employer identification number	Name of or	(Form 990, 990-EZ, or 990-PF) (2019) ganization		Employer Identification numb
OTED	SCHOOL		47-1901769		SCHOOL		47-1901769
rt II	Noncash Property (see instructions). Use duplicate copies of Part II if a	dditional space is needed	L	Part III	from any one contributor. Complete columns completing Part II, enter the total of exclusively religious	(a) through (e) and the following line entry , charitable, etc., contributions of \$1,000 or i	ction 601(c)(7), (8), or (10) that total more than \$1,000 for the y ty. For organizations less for the year. (fails tills latu, exc.) ► \$
a) Io.	(9)	(c)	. (d)	(a) No.	Use duplicate copies of Part III if additiona		
m rt I	Description of noncash property given	FMV (or estimate (See instructions.)	Data received	from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
_							
		\$		-		(e) Transfer of gift	t
a) Io.	(b)	(c)	(d)	-	Transferee's name, address.	and ZIP + 4	Relationship of transferor to transferee
om art I	Description of noncash property given	FMV (or estimate (See instructions.)	Data secoluted				
				(a) No. from	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
		\$		Parti	(b) Fulpose of Sire		
a) Io.	(6)	(c)	(d)			·	
m rti	Description of noncash property given	FMV (or estimate (See instructions.)	Data sealand			(e) Transfer of gift	1
				-	Transferee's name, address,	and ZIP + 4	Relationship of transferor to transferee
		\$					
(a) No. rom	(b) Description of noncash property given	(c) FMV (or estimate		(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
rti		(See Instructions.)	·				
-				-		(e) Transfer of gift	t
		\$			Transferee's name, address,	and ZIP + 4	Relationship of transferor to transferee
a) lo. om	(b) Description of noncash property given	(c) FMV (or estimate (See instructions.)					
rtl			·	(a) No. from	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
-		5		Parti		·	
a)		•					
o. Im rt I	(b) Description of noncash property given	(c) FMV (or estimate (See instructions.)			Transferee's name, address.	(e) Transfer of gift	Relationship of transferor to transferee
					Transieree's name, 300ress.		research and the administration of a definition
		\$					
3 11-08-	24	Schedule	C (Form 990, 990-EZ, or 990-PF) (2019)	923454 11-08-	10	25	Schedule B (Form 990, 990-EZ, or 990-PF) (2

Complete if the organization answered "Yes" or			
(a) Description of security or category (netwing name of ancarity)	(b) Book value	(c) Method of valuation: Cost or end-	of-year market value
) Financial derivatives			
2) Closely held equity interests			75
3) Other			
(A)		8	
(B)			
(C)		1	j.
(D)			
(E)		2.	
(F)			
(a)			
(H)			
etal. (Col. (b) must enail form 990. Part X. col. (B) line 12.) Part VIII Investments - Program Related. Complete If the organization answered "Yes" or	Earm 990 Part IV line	11c San Form 000 Part V line 19	-
(a) Description of investment	(b) Book value	(c) Method of valuation: Cost or end-	of-year market value
(1)	6.000 L		
(2)			
(3)			
(4)			
(4)		2	
(6)			
(7)			
(8)			
(9) etal. (Col. (b) must equal Form 990, Part X. col. (B) line 13.)			
Complete If the organization answered "Yes" or		11d. See Form 990, Part X, line 15.	
(a) D	n Form 990, Part IV, line escription	e 11d. See Form 990, Part X, line 15.	(b) Book value
(a) D (1)		: 11d. See Form 990, Part X, line 15.	(b) Book value
(a) D (1) (2)		e 11d. See Form 990, Part X, line 15.	(b) Book value
(1) D (2) (3)		e 11d. See Form 990, Part X, line 15.	(b) Book value
(a) D (2) (3) (4)		: 11d. See Form 990, Part X, line 15.	(b) Book value
(1) (2) (3) (4) (6)		: 11d. See Form 990, Part X, line 15.	(b) Book value
(a) D (2) (3) (4) (6) (6)		: 11d. See Form 990, Part X, line 15.	(b) Book value
(a) D (2) (3) (4) (6) (6) (7)		: 114. See Form 990, Part X, line 15.	(b) Book value
(1) (2) (3) (4) (6) (6) (7) (8)		: 114. See Form 990, Part X, line 15.	(b) Book value
(a) D (2) (3) (4) (6) (6) (7)		: 11d. See Form 990, Part X, line 15.	(b) Book value
(a) D (1) (2) (3) (4) (6) (6) (7) (8) (9) (9) (9) (9) (9) (9) (9) (9) (9) (9	escription	: 11d. See Form 990, Part X, line 15.	(b) Book value
(a) D (1) (2) (3) (4) (6) (6) (7) (8) (9) Otal. (Column (b) must const Form 980, Part X, col. (8) line : Part X Other Liabilities. Complete If the organization answered "Yes" o	escription		
(a) D (1) (2) (3) (4) (6) (6) (7) (8) (9) (9) (9) (9) (9) (9) (9) (9) (9) (9	escription		(b) Book value (b) Book value
(a) D (1) (2) (3) (4) (4) (5) (6) (7) (8) (9) Other Liabilities. Complete If the organization answered "Yes" or (a) Description of liability (1) Federal income taxes	escription		
(a) D (1) (2) (3) (4) (6) (6) (7) (8) (6) (7) (8) (9) otal. (Column (b) must equal Form 980, Part X, col. (b) line (9) otal. (Column (b) must equal form 980, Part X, col. (b) line (9) otal. (Complete If the equalization answered "Yes" or (9) Complete If the equalization answered "Yes" or (9) Complete If the equalization answered "Yes" or (9) (1) Federal income taxes (2)	escription		
(a) D (1) (2) (3) (4) (6) (6) (7) (8) (9) Complete if the organization answered "Yes" o (a) Complete if the organization answered "Yes" o (b) Complete if the organization of liability (c) (c) Complete income taxes (c) (c) (c) (c) (c) (c) (c) (c) (c) (c)	escription		
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(a) D (1) (2) (3) (4) (4) (4) (5) (6) (7) (8) (9) Part X Other Liabilities. Complete If the organization answered "Yes" or (a) Description of liability (1) Federal income takes (2) (3) (4)	escription		
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(a) D (1) (2) (3) (4) (6) (6) (7) (8) Otal. (Column b) must equal Form 980. Part X. col. (8) line 1 (9) Otal. (Column b) must equal Form 980. Part X. col. (8) line 2 (9) Otal. (Complete If the equalization answered "Yes" or (9) Complete If the equalization answered "Yes" or (9) (1) Federal income taxes (2) (3) (4) (5) (6) (7)	escription		
(a) D (1) (2) (3) (4) (6) (6) (7) (8) (9) (9) (9) (9) (9) (9) (9) (9) (9) (9	ISJ		
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(a) D (1) (2) (3) (4) (5) (6) (7) (8) (9) (6) (7) (8) (9) (9) (9) (9) (1) Federal income taxes (2) (9) (1) Federal income taxes (2) (9) (1) Federal income taxes (2) (9) (9) (9) (9) (9) (9) (9) (9) (9) (9	25.) text of the footnote t	t 11e or 11f. See Form 990, Part X, line 25.	(b) Book value

28 2019.05094 ROOTED SCHOOL

213-1181

21000510 131839 213-118280-00

Complete If the organization answered "Yes" on Form 990			3,047,306
1 Total revenue, gains, and other support per audited financial state			3,047,306
2 Amounts included on line 1 but not on Form 990, Part VII, line 12			
a Net unrealized gains (losses) on Investments			
b Donated services and use of facilities			
c Recoveries of prior year grants			
d Other (Describe in Part XIII.)			
e Add lines 2a through 2d		2e	0.
3 Subtract line 2e from line 1		3	3,047,306
4 Amounts included on Form 990, Part VIII, line 12, but not on line	1:		
a Investment expenses not included on Form 990, Part VIII, line 7b	43		
b Other (Describe in Part XIII.)	40		
c Add lines 4a and 4b		40	0
5 Total revenue. Add lines 3 and 4c. (This must equal Form 990, Part XII Reconciliation of Expenses per Audited Fina	art L line 12.1		3,047,306
2 Amounts included on line 1 but not on Form 990, Part IX, line 25: a Donated services and use of facilities			
2 Amounts included on line 1 but not on Form 990, Part IX, line 25:	1 1		
b Prior year adjustments			
c Otherlosses			
d Other (Describe in Part XIII.)			0
e Add lines 2a through 2d			2,765,621
3 Subtract line 2e from line 1			4,100,041
4 Amounts included on Form 990, Part IX, line 25, but not on line 1			
a Investment expenses not included on Form 990, Part VIII, line 7b			
b Other (Describe in Part XIII.)			0
c Add lines 4a and 4b			0
5 Total expenses. Add lines 3 and 4c. (This must equal Form 990.) Part XIII Supplemental Information.	Part I. line 18.1		2,765,621
rovide the descriptions required for Part II, lines 3, 5, and 9; Part III, lin	es 1a and 4; Part IV, lines 1b and 2b; P	art V, line 4; Part)	(, line 2; Part XI,

UNDER	INTE	RNAL	REV	ENUE	CODE	SECTI	ON 50	1(C)((3).	ACC	ORDIN	IGLY,	NO	PROT	VISION
AS B	EEN M	ADE	FOR	INCON	E TAX	ES. M	ANAGE	MENT	HAS	DET	ERMIN	ED T	HAT	ALL	INCOME
PAX P	OSITI	ONS	ARE	MORE	LIKEL	Y THA	N NOT	OF E	BEING	; su	STAIN	ED U	PON	POTI	ENTIAL
AUDIT	ORE	XAMI	NATI	ON; 7	HEREF	ORE,	NO I	SCLOS	URES	OF	UNCE	RTAI	N IN	ICOM	E TAX
POSIT	IONS	ARE	REQU	IRED.	THE	SCHOO	L IS	SUBJE	ECT 1	NO I	NCOME	TAX	ON	NET	INCOME
THAT	IS DE	RIVE	DFR	OM BU	SINES	S ACT	IVITI	ES TH	IAT A	RE	UNREL	ATED	TO	THE	EXEMPT
PURPO	SES.	THE	SCHO	OL FI	LES A	ND EX	EMPT	SCHOO	DL RE	TUR	N ANI	APP	LICZ	BLE	al al chi
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830054 10-02-19	(1) (1) (1) (1) (1) (1) (1) (1) (1) (1)	Schedule D (Form 990) 2019
	29	
21000510 131839 213-118280-00	2019.05094 ROOTED SCHOOL	213-1181

1. 0.11	n 990)	Part IV, line 6, 7, 8, 9	organization answered "Yes" on Fon 10, 11a, 11b, 11c, 11d, 11e, 11f, 12a Attach to Form 990.	m 990, a. or 12b.	2019
Departs	Ference Service	Co to www.irr.gov/Eor	Attach to Form 990. m990 for instructions and the latest.	Intermetion	Open to Public Inspection
_	e of the organizatio		1750 for the decidity and the latest		over identification number
		ROOTED SCHOOL			47-1901769
Par	t I Organiza	ations Maintaining Donor Advi	sed Funds or Other Similar F	unds or Account	ts. Complete If the
_	organization	n answered "Yes" on Form 990, Part IV	Ine 6.		
	0200000000		(a) Donor advised funds	(b) Fun	ds and other accounts
1	Total number at en	nd of year			
2	Appregate value of	contributions to (during year)			
		grants from (during year)			
		t end of year			
		on inform all donors and donor advisors		r advised funds	
		n's property, subject to the organizatio			Yes No
6		on inform all grantees, donors, and done			
	-	oses and not for the benefit of the done			
	Impermissible priva	ate benefit?			Yes No
Par	t II Conserva	ation Easements. Complete If the	organization answered "Yes" on Form	n 990, Part IV, line 7.	
1		ervation easements held by the organiz			
	Preservation	of land for public use (for example, rec	reation or education) Preserva	ation of a historically	Important land area
	Protection of	f natural habitat	Preserva	ation of a certified his	storic structure
	Preservation	of open space			
2		through 2d if the organization held a qu	alfied conservation contribution in the	e form of a conservat	tion easement on the last
	day of the tax year				Held at the End of the Tax Year
а	Total number of co	onservation easements		2a	
		ricted by conservation easements		2b	
c	Number of conserv	vation easements on a certified historic	structure included in (a)	20	
		vation easements included in (c) acquire			
	listed in the Nation	al Register		2d	1000
3		vation easements modified, transferred,			during the tax
	year 🍉				
4	Number of states v	where property subject to conservation	easement is located >		
6	Does the organizat	tion have a written policy regarding the	periodic monitoring, inspection, handi	ling of	
	violations, and enfo	orcement of the conservation easemen	ts it holds?		Yes No
6		r hours devoted to monitoring, inspecti			ments during the year
	•				
7	Amount of expense	es incurred in monitoring, inspecting, h	anding of violations, and enforcing co	nservation easement	s during the year
	► \$				
8	Does each conserv	vation easement reported on line 2(d) at	pove satisfy the requirements of section	on 170(h)(4)(B)()	100 CO. 100 CO. 100 CO. 100 CO. 100 CO. 100 CO. 100 CO. 100 CO. 100 CO. 100 CO. 100 CO. 100 CO. 100 CO. 100 CO.
	and section 170(h)	(4)(8)(1)?			Yes No
9		be how the organization reports conserv			
	balance sheet, and	Include, if applicable, the text of the fo	obnote to the organization's financial :	statements that desc	ribes the
		ounting for conservation easements.			
Par	t III Organiza	ations Maintaining Collections	of Art, Historical Treasures,	or Other Similar	Assets.
	Complete If	the organization answered "Yes" on Fi	orm 990, Part IV, line 8.		
1a	If the organization	elected, as permitted under FASB ASC	958, not to report in its revenue state	ment and balance sh	eet works
	of art, historical tre	asures, or other similar assets heid for	public exhibition, education, or research	ch in furtherance of p	sublic
	service, provide in	Part XIII the text of the footnote to its f	nancial statements that describes the	se items.	
b	If the organization	elected, as permitted under FASB ASC	958, to report in its revenue statement	t and balance sheet	works of
	art, historical treas	ures, or other similar assets held for pu	blic exhibition, education, or research	in furtherance of put	olic service,
	provide the following	ng amounts relating to these items:			
	(I) Revenue Inclus	ded on Form 990, Part VIII, line 1		•	\$
		d in Form 990, Part X			5
2	If the organization	received or heid works of art, historical	treasures, or other similar assets for fr	inancial gain, provide	
	the following amou	ints required to be reported under FAS	8 ASC 958 relating to these items:		
		on Form 990, Part VIII, line 1		•	5
	Assets included in				1
		eduction Act Notice, see the instruct	ons for Form 990.		Schedule D (Form 990) 2019
LHA					
	10-02-10				

Bart IV Escrow and Custodial Arrangements. Complete if the organization answered "Yes" on Form 990, Part IV, line 9, or reported an amount on Form 990, Part X, line 21. Is the organization an agent, thustee, custodial or other intermediary for contributions or other assets not included on Form 990, Part X, line 21. Yes Iv Is the organization and exit, thustee, custodial and complete the following table: It Yes Iv If Yes,* explain the arrangement in Part XIII and complete the following table: It It It If Bedginning balance It It It It If Bedginning balance It It It It If Bedginning the year It It It It It If Bedginning the year It It <th>Part III Organizations Maintaining C</th> <th>ollections of Ar</th> <th>t. Historical Tr</th> <th>easures, or Oth</th> <th>er Similar As</th> <th>190176</th> <th>-</th> <th>-</th>	Part III Organizations Maintaining C	ollections of Ar	t. Historical Tr	easures, or Oth	er Similar As	190176	-	-
a close ton here (hetc all that apply): b Close or exchange program c Close of the close of exchange program c Close of the close of exchange program c Close of the close of the close of the close of exchange program c Close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close of the close							100-000	_
a Public childbion d Can or exchange program b Scholarly research e Other						200		
c Preservation for Mutare generations Provide a description of the organization's collections and explain how they further the organization's exempt purpose in Part XIII. During the year, did the organization societ or receive donations of art, historical treasures, or other similar assets to be sold to raize finite states than to be maintained as part of the organization answered "Yes" on Form 990, Part IV, line 9, or reported an amount on Form 990, Part X, line 21. a is the organization an agent, trustee, custodian or other intermediary for contributions or other assets not included on Form 990, Part X, line 21. b if "Yes," explain the anangement in Part XIII and complete the following table: c Beginning balance 16 d Additions during the year 16 1 Endowing the year 16 1 Endowing the year 16 2 Distributions during the year 16 3 If West exclusion include an amount on Form 990, Part X, line 21, for escrow or custodial account tablity? Yes a Beginning of year balance (a) Prior year (c) Two years back (d) Three years back a Beginning of year balance (b) Prior year (c) Two years back (d) Three years back a Beginning of year balance (b) Prior year (c) Two years back (d) Two years back a Orthor exclusations (b) Prior year (c) Two years back (d) Two years back			Loan or ex	change program				
Provide a description of the organization solicit or receive donations of art, historical breauxes, or other similar assets to be solid orals hands rather than to be maintained as part of the organization asswered "Yes" on Form 990, Part IV, line 9, or reported an amount on from 990, Part IV, line 21, Or contributions or other assets not included on Form 990, Part IV, line 21, line 32, line 32, line 32, line 33, line 34, line 34, line 34, and losses on Form 990, Part IV, line 30, Part X, line 21, lor excerve custodal account liability? Yes	b Scholarly research		Other					
b During the year, did the organization solicit or receive donations of art, historical treasures, or other similar assets to be sold to also funds rather than to be maintained as part of the organization acolection? reported an amount on Form 590, Part X, line 21. Is the organization anagement in Part Xill and complete the following table: reported an amount on Form 590, Part X, line 21. Is the organization anagement in Part Xill and complete the following table: reported an amount on Form 590, Part X, line 21. Reginning balance reported an amount on Form 590, Part X, line 21. Reginning balance reported an amount on Form 590, Part X, line 21. Reginning balance reported an amount on Form 590, Part X, line 21. Reginning balance reported an amount on Form 590, Part X, line 21. Reginning balance reported an amount on Form 590, Part X, line 21. Reginning balance reported an amount on Form 590, Part X, line 21. Reginning balance reported an amount on Form 590, Part X, line 21. Reginning balance reported an amount on Form 590, Part X, line 21. Reginning balance reported an amount on Form 590, Part X, line 21. Reginning balance reported an amount on Form 590, Part X, line 21. Reginning balance reported an amount on Form 590, Part X, line 21. Reginning balance reported an amount on Form 590, Part X, line 21. Reginning balance reported an amount on Form 590, Part X, line 21. Reginning balance reported an amount on Form 590, Part X, line 21. Reginning balance reported an amount on Form 590, Part X, line 21. Reginning balance reported an amount on Form 590, Part X, line 21. Reginning balance reported an amount on Form 590, Part X, line 21. Reginning balance reported an amount on Form 590, Part X, line 21. Reginning balance reported an amount on Form 590, Part X, line 21. Reginning balance Reginning balance Reginning balance Reginning balance Reginning balance Reginning balance Reginning balance Reginning balance Reginning balance Reginning balance Reginning balance Reginning	c Preservation for future generations							
to be sold to raise funds rather than to be maintained as part of the organization is collection? Yes Ives	Provide a description of the organization's co	elections and explain	how they further t	the organization's ex	empt purpose in i	Part XIII.		
Bart IV ESCrow and Custodial Arrangements. Complete If the organization answered "Yes" on Form 990, Part IV, Ine 9, or reported an amount on Form 990, Part IV, Ine 9. reported an amount on Form 990, Part X, Ine 21. Is the organization an agert, Bustles, custodian or other intermediary for contributions or other assets not included on Form 990, Part X? IV If 'Yes, 'explain the arrangement in Part XIII and complete the following table: Image: Complete III (Complete IIII (Complete IIII (Complete III (Complete IIII Complete IIII (Complete IIII (Complete IIII (Complete IIII (Complete IIIII (Complete IIII (Complete IIII IIIIIIIIIIIIIIIIIIIIIIIIIIIIII	5 During the year, did the organization solicit o	r receive donations of	of art, historical trea	asures, or other simi	ar assets	_		
reported an anount on Form 390, Part X, line 21. 1a is the organization an agent, trustee, custodian or other intermediary for contributions or other assets not included on Form 390, Part X?								N
ia is the organization an agent, trustee, custodian or other intermediary for contributions or other assets not included on Form 990, Part X? b If "Yes," explain the arrangement in Part XIII and complete the following table: c Beginning balance c Beginning balance d Additions during the year 14 e Distributions during the year 15 Did the organization include an amount on Form 990, Part X, line 21, for escrow or custodial account liability? 16 17 18 19 14 10 10 11 12 13 14 14 14 15 16 17 18 19 14 10 10 11 12 13 14 14 14 15 16 17 18 19 10 10 10 11 12 13 14 14 14 15 16 17 18 19 10 10 10 11 12 13 14 14 14 15 16 17 <td></td> <td></td> <td>ete if the organizati</td> <td>on answered "Yes"</td> <td>on Form 990, Part</td> <td>IV, line 9, o</td> <td>r</td> <td></td>			ete if the organizati	on answered "Yes"	on Form 990, Part	IV, line 9, o	r	
on Form 990, Part X? Yes N b If "Yes," explain the anangement in Part XIII and complete the following table:			lary for contribution	as or other prosts p	at included			_
b If "Ves," explain the arrangement in Part XIII and complete the following table: Amount tc d c Beginning balance 1c 1d d Additions during the year 1d 1d d Distributions during the year 1d 1d 1d d Distributions during the year 1d 1d 1d d Distributions during the year 1d 1d <td< td=""><td></td><td></td><td></td><td></td><td></td><td>Yes</td><td></td><td>N</td></td<>						Yes		N
c Beginning balance 1c d Additions during the year 1d d Distributions during the year 1c d Ending balance 1f d Distributions during the year 1c d Distributions during the year 1f d Distrestimet and preserats during the year								
d Additions during the year 18 e Distributions during the year 16 1 Ending balance 17 1 Bit Area 18 1 Bit Area 17 1 Bit Area 18 1 Bit Area 18 1 Bit Area 19 1 Bit Area 10 1 Bit Area					2.0	Атоц	nt	
d Additions during the year	c Beginning balance				1c			
f Ending balance 1f a Did the organization include an amount on Form 990, Part X, line 21, for escrow or custodial account liabity? 1 b If Yes * contraine the parabasement in Part XIII. Check here if the expansion has been provided on Part XIII. 1 b If Yes * contraine the parabasement in Part XIII. Check here if the expansion answered "Yes" on Form 990, Part IV, line 10. 1 b Beginning of year balance (a) Current year (b) Prior year (c) Two years back (d) Three years back (e) For years back b Contributions (a) Current year (b) Prior year (c) Two years back (d) Three years back (e) For years back c Net twestment earnings, gains, and issees (a) Current year (b) Prior year (c) Two years back (d) Three years back c Other expenditures for facilities (a) Current year (a) Course the standance (b) Prior years (c) Two years back (c) Two years back c Provide the estimated or quasi-endowment b					1d			
a Did the organization include an amount on Form 990, Part X, time 21, for escrow or custodial account liability? Yes ▶ b If Yes' = copiant the arrangement in Part XIII. Check here if the copiantion has been provided on Part XIII. Image: Check here if the copiantion has been provided on Part XIII. Image: Check here if the copiantion has been provided on Part XIII. a Beginning of year balance (a) Current year (b) Prior year (c) Two years bad. (c) Two years bad. </td <td>e Distributions during the year</td> <td></td> <td></td> <td></td> <td>10</td> <td></td> <td></td> <td></td>	e Distributions during the year				10			
b. If Yes' - explain the arangement In Part XIII. Check here If the explanation has been provided on Part XIII. art V Endowment Funds. Complete If the organization answered "Yes" on Form 590, Part IV, the 10. art V Endowment Funds. Complete If the organization answered "Yes" on Form 590, Part IV, the 10. a Beginning of year balance (a) Current year (b) Prior years bala (c) Twe years had (c) Four years had (c) Four years had (c) Four years had (c) Four years had (c) Four years had (c) Four years had (c) Four years had (c) Four years had (c) Four years had (c) Four years had (c) Four years had (c) Four years had (c) Four years had (c) Four years had (c) Four years had (c) Four years had (c) Four years had (c) Four years had (c) Four years had (c) Four years had (c) Four years had (c) Four years had (c) Four years had (c) Four years had (c) Four years had (c) Four years had (c) Four years had (c) Four years had (c) Four years had (c) Four years had (c) Four years had (c) Four years had (c) Four years had (c) Four years had (c) Four years had (c) Four years had (c) Four years had (c) Four years had (c) Four years had (c) Four years had (c) Four years had (c) Four years had (c) F	f Ending balance				11	-		
art V Endowment Funds. complete if the organization answered "Yes" on Form 990, Part IV, Ine 10. a Beginning of year balance (a) Current year (b) Prior year (c) Two years back (d) Time years back (e) Four years back b Contributions (a) Current year (b) Prior year (c) Two years back (d) Time years back (e) Four years back c Other expenditures for facilities (a) Current year (b) Prior year (c) Two years back (d) Time years back d Grants or scholarships (b) Prior year (c) Two years back (d) Time years back (e) Four years back c Other expenditures for facilities (c) Two years back (c) Two years back (d) Time years back c Other expenditures for facilities (c) Two years back (c) Two years back (d) Time years back c Other expenditures for facilities (c) Two years back (c) Two years back (c) Two years back e End of years balance (f) Two years back (f) Two years back (f) Two years back Pervide the estimated percentages on times 2a, 2b, and 2c should equal 100%. (f) The percentages on times 2a, 2b, and 2c should equal 100%. (f) Related organizations (g) I (f) Related organizations (g) I (f) Related organizations						Yes		N
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b Contributions	a Beginging of year balance	(a) current year	(of the feat	(c) inv years and	(of fines years)	inch (c)re		- and a
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f Administrative expenses g End of year balance F Administrative expenses G End of year balance F Provide the estimated percentage of the current year end balance (line 1g, column (al) held as: B Board designated or quasi-endowment								
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2 Provide the estimated percentage of the current year end balance (line 1g, column (a)) held as: a Board designated or quast-endowment		1			2			
a Board designated or quasi-endowment ▶% b Permanent endowment ▶% c Term endowment ▶% The percentages on lines 2a, 2b, and 2c should equal 100%. Sa Are there endowment hunds not in the possession of the organization that are held and administered for the organization by: (i) Unrelated organizations	g End of year balance							
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c Term endowment ▶	a Board designated or quasi-endowment 🕨		_96					
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Sa Are there endowment funds not in the possession of the organization that are held and administered for the organization by:		96						
by: by: Yes N (I) Inclated organizations Sall (II) Related organizations Sall b If 'Yes' on line 3a0(), are the related organizations listed as required on Schedule R? Sall b Description of property Sall of Schedule R? Complete If the organization answered 'Yes' on Form 990, Part V, line 11a. See Form 990, Part X, line 10. Description of property (a) Cost or other (b) Cost or other (c) Accumulated (c) Leasehold Improvements Cost (b) Cost or other c) Leasehold Improvements Cost (c) Accumulated (d) Equipment Cost (c) Accumulated								
(i) Unrelated organizations galt) (ii) Related organizations galt) (iii) Related organizations galt) 1) If 'res' on the saluk, are the related organizations listed as required on Schedule R? galt) 1) Description of property galt) (iii) Cost or other 10) Description of property (a) Cost or other 10) Description of property (a) Cost or other 10) Cost or other (b) Cost or other 10) Description of property (a) Cost or other 10) Description of property (a) Cost or other 10) Cost or other (b) Cost or other 10) Description of property (a) Cost or other 11) Description of property (b) Cost or other 12) Description of property (a) Cost or other 14) Description of property (b) Cost or other 15) Land, Bultidings, (c) Exacthoid Improvements 16 Equipment 16 Other 16. Add lines 1a through 15: Costron other (b) Exaction (d) must execut from 390. Part X costron (d) line 10: 1		ssion of the organiza	ation that are held a	and administered for	the organization			
(ii) Related organizations Ba(ii) b If "Yes" on line 3a(i), are the related organizations listed as required on Schedule R? Ba(ii) Descript in ParXIII the intended uses of the organization's endowment funds. Ba(iii) Complete If the organization answered "Yes" on Form 990, Part X, line 10. Construction of property Description of property (a) Cost or other (b) Cost or other Description of property (a) Cost or other (c) Accumulated b Buildings Description of property (a) Cost or other b Buildings Description of property (a) Cost or other b Buildings Description of property (b) Cost or other c Lazachoid improvements Description of property Description of property c Lazachoid improvements Description Description of property c Lazachoid improvements Description Description c Lazachoid improvements Description Description c Add lines 1a through 1s. Codemon of must ensure form 940. Part X column (B). Ine 10: Long Description						0-11		NC
b if Yres' on line 3a(0), are the related organizations listed as required on Schedule R?								-
L Describe in Part XII the intended uses of the organization's endowment funds. Somplete T the organization answered "Yes" on Form 990, Part N, the 11a. See Form 990, Part X, the 10. Description of property (a) Cost or other (b) Cost or other (c) Accumulated depreciation as is (investment) basis (other) basis (other) basis (other) basis (other) basis (other) basis (other) complete T the organization answered "Yes" on Form 990, Part X, the 10. Complete T the organization answered "Yes" on Form 990, Part X, the 10. Description of property (a) Cost or other (b) Cost or other (c) Accumulated depreciation basis (other) basis (other) basis (other) cost or other (c) Accumulated depreciation cother								_
land VI Land, Buildings, and Equipment. Complete If the organization answered 'Yes' on Form 990, Part IV, line 11a. See Form 990, Part X, line 10. Description of property (a) Cost or other basis (investment) (b) Cost or other basis (other) (c) Accumulated depreciation (d) Book value Ia Land								_
Description of property (a) Cost or other basis (investment) (b) Cost or other basis (other) (c) Accumulated depreciation (d) Book value 1a Land			Contraction Institution					_
basis (nvestment) basis (other) depreciation b Buildings	Complete If the organization answere	d 'Yes' on Form 990	, Part IV, line 11a.	See Form 990, Part	X, line 10.			
ta Land b Buildings c Lazachold Improvements d Equipment c Other c Other b C Lazachold Is. Column (d must equipment form 930, Part X column (d), the 1or 1 b C C C C C C C C C C C C C C C	Description of property	(a) Cost or o	ther (b) Cos	st or other (c	Accumulated	(d) Bo	ok value	
b Buildings		basis (investr	ment) basis	s (other)	depreciation	000000	9993240	X
c Leasehold Improvements	la Land							
e Other			2					_
e Other			2					_
tal, Add lines 1a through 1c. (Column (di must envoi Form 990. Part X. column (8). Rec 10c i		-	-					_
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8chedule D (Form 990) 20	tal. Add lines 1a through 1c. (Column (d) must e	mual Form 990 Part	X column (R) (ine	10-1	-			
					Sche	dule D (For	m 990)	201

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Schedule D Form 950) 2019 ROOTED SCE Part XIII Supplemental Information continued	HOOL	17-1901769 Page 5	SCHEDULE E (Form 990 or 990-EZ)	Schools Complete If the organization answered "Yes" on Form 990, Part IV, line 13, or Form 990-EZ, Part VI, line 48.	2	01	9
			Department of the Treasury Internal Revenue Service	Attach to Form 990 or Form 990-EZ. Bo to www.irs.gov/Form990 for the latest information.	Open	to Pu	
			Name of the organization		r Identifica		
			ROO	DTED SCHOOL	¥7-190	176	59
			Part I			YE	ES N
			1 Does the organization have	a racially nondiscriminatory policy toward students by statement in its charter, bylaws,			-
				, or in a resolution of its governing body?	1	2	x
			-	ide a statement of its racially nondiscriminatory policy toward students in all its brochures, en communications with the public dealing with student admissions, programs, and scholarsh			-
				en communications with the public dealing with student admissions, programs, and scholarsi ized its racially nondiscriminatory policy through newspaper or broadcast media during the		-	Ť
				idents, or during the registration period if it has no solicitation program, in a way that makes			
				s of the general community it serves? If "Yes," please describe. If "No," please explain.			
			If you need more space, us NONDISCRIMINAT	ePart	J 3	2	4
				CRIALS FOR NEW STUDENTS.	<u> </u>		
					=		
			4 Does the organization main	tain the following?	_		
				al composition of the student body, faculty, and administrative staff?	4:		x
				scholarships and other financial assistance are awarded on a racially nondiscriminatory basis rochures, announcements, and other written communications to the public dealing with stude			+
			admissions, programs, and		40		
				by the organization or on its behalf to solicit contributions?	4	d X	x
				y of the above, please explain. If you need more space, use Part II. 25 NOT PROVIDE ANY SCHOLARSHIPS OR FINANCIAL			
			ASSISTANCE.	S NOT PROVIDE ANT SCHOLARSHIPS ON FINANCIAL			
					_		
			E Deer the encodeding day	iminate by race in any way with respect to:	-1		
			 a Students' rights or privilege 		5		
			b Admissions policies?		61		
				dministrative staff?	50		\rightarrow
			d Scholarships or other finance Educational policies?	cial assistance?	50		
			f Use of facilities?				+
			g Athletic programs?		6		
			h Other extracurricular activit		61	h	_
			If you answered "Yes" to an	ny of the above, please explain. If you need more space, use Part II.			
					_		
			6a Does the organization recei	ive any financial aid or assistance from a governmental agency?		a X	х
				t to such aid ever been revoked or suspended?		•	\rightarrow
				Ither line 6a or line 6b, explain on Part II.			
			-	fy that it has compiled with the applicable requirements of sections 4.01 through 4.05 of .B. 587, covering racial nondiscrimination? If "No." explain on Part II	т		x
					(Form 990 (or 990-	I-EZ)
20055 10-02-10		Schedule D (Form 990) 2019	832061 10-09-19				
0510 101000 010 110000 00	30	212 1101	21000510 121020 012	31			21.7
0510 131839 213-118280-00	2019.05094 ROOTED SCHOOL	213-1181	21000510 131839 213-	118280-00 2019.05094 ROOTED SCHOOL		- 2	213

International Information. Provide the explanations required by Part I, lines 3, 4d, 5h, 6b, and 7, as applicable. Also provide any other additional information.	SCHEDULE O (Form 990 or 990-EZ) Department of the Treasery Internal Review Service	Supplemental Information to Complete to provide Information for respons Form 990 or 990-EZ or to provide any 3 Mattach to Form 990 or	ses to specific questions on additional information. 990-EZ. Open to Put
NE 6 - EXPLANATION OF GOVERNMENT FINANCIAL AID:	Name of the organization	► Go to www.irs.gov/Form990 for th ROOTED SCHOOL	Employer identification nu 47-1901769
OTED SCHOOL IS A PUBLIC CHARTER SCHOOL PRINCIPALLY FUNDED BY STATE AND			47-1901/09
DERAL MONIES.		VI, SECTION B, LINE 11B:	
			IDE PUBLIC ACCOUNTING FIRM BASE
		PROVIDED BY MANAGEMENT. ONCE	
	AVAILABLE, IT 1	IS REVIEWED BY MANAGEMENT WIT	H ANY CHANGES OR REVISIONS
	INCORPORATED IN	TO THE FILING. THE REVISED F	RETURN IS THEN SUBMITTED TO THE
	BOARD OF DIRECT	TORS FOR THEIR REVIEW AND APP	PROVAL PRIOR TO SUBMITTING TO T
	IRS.		
	FORM 990, PART	VI, SECTION B, LINE 12C:	
	THE OFFICERS, I	DIRECTORS, AND TRUSTEES ALL &	SIGN THE CONFLICT OF INTEREST
	POLICY ON AN AN	NUAL BASIS. THE ORGANIZATION	ALSO HOLDS MONTHLY BOARD
	MEETINGS WHERE	THE BOARD DISCUSS OPPORTUNIN	FIES AND POTENTIAL CONFLICTS OF
	INTEREST. IF A	CONFLICT OF INTEREST WERE TO	ARISE, THE BOARD CHAIR WOULD
	DIRECT A COMMIT	TTEE OR THE GOVERNING BOARD T	TO INVESTIGATE THE NATURE OF TH
	CONFLICT OF INT	TEREST. FURTHERMORE, THE BOAR	RD CHAIR WOULD THEN DELEGATE TH
	TASK TO THE GOV	VERNING BOARD OR COMMITTEE TO	RESEARCH ALL FEASIBLE
	ALTERNATIVES TO	EVALUATE IN LIEU OF THE POT	TENTIAL CONFLICT OF INTEREST.
	FORM 990, PART	VI, SECTION B, LINE 15:	
	THE BOARD REVIE	WS AND APPROVES THE COMPENSA	ATION AMOUNTS FOR ROOTED'S CEO
	BASED ON THE MA	ARKET RATE FOR THE POSITION.	THE CEO DETERMINES THE
	COMPENSATION OF	OTHER KEY EMPLOYEES OF THE	ORGANIZATION IN ACCORDANCE WIT
			INED BASED ON DATA PROVIDED BY
	.		AND THROUGH COMPARISON STUDIES
	OTHER CHARTER S		
	·		

Name of the organization ROOTED SCHOOL	Employer Identification numb 47-1901769
	11-1501705
FORM 990, PART VI, SECTION C, LINE 19:	
THE DOCUMENTS ARE READILY AVAILABLE TO THE PUBLIC UPON REC	QUEST.
FORM 990, PART IX, LINE 11G, OTHER FEES:	
OTHER PROFESSIONAL SERVICES:	
PROGRAM SERVICE EXPENSES	63,491
MANAGEMENT AND GENERAL EXPENSES	24,860
FUNDRAISING EXPENSES	0
TOTAL EXPENSES	88,351
INSTRUCTIONAL - SUBSTITUTE TEACHERS:	
PROGRAM SERVICE EXPENSES	13,219
MANAGEMENT AND GENERAL EXPENSES	0
FUNDRAISING EXPENSES	0
TOTAL EXPENSES	13,219
COUNSELING SERVICES:	
PROGRAM SERVICE EXPENSES	68,558
MANAGEMENT AND GENERAL EXPENSES	0
FUNDRAISING EXPENSES	0
TOTAL EXPENSES	68,558
STUDENT TRANSPORT - BUS COMPANY:	
PROGRAM SERVICE EXPENSES	172,245
MANAGEMENT AND GENERAL EXPENSES	0
FUNDRAISING EXPENSES	0
TOTAL EXPENSES	172,245
802212 09-09-19 Sche	dule O (Form 990 or 990-EZ) (20

Page 2 number	Schedule O (Form 990 or 990-EZ) (2019) Name of the organization	Employer Identification number
	ROOTED SCHOOL	47-1901769
	FOOD SERVICE:	
	PROGRAM SERVICE EXPENSES	110,764.
	MANAGEMENT AND GENERAL EXPENSES	0.
	FUNDRAISING EXPENSES	0.
	TOTAL EXPENSES	110,764.
91.	TOTAL OTHER FEES ON FORM 990, PART IX, LINE 11G, COL A	453,137.
60.		
0.	FROM 990, PART XII, LINE 2C	
51.	THE ORGANIZATION HAS NOT CHANGED THE OVERSIGHT PROCESS OF	SELECTION
	PROCESS DURING THE TAX YEAR.	
19.		
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0.		
19.		
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58.		
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45.		
) (2019)		hedule O (Form 990 or 990-EZ) (2019)
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	uary 2020)		-	nization Return			OMB No. 1545-0047
	of the Traccury anse Service			868 for the latest information.			
Electron	ic filing (e-file)	You can electronically file Form 8868 to	request a	6-month automatic extension of time	e to file ar	y of the	d .
		he exception of Form 8870, Information					
	-	extension request must be sent to the IR ww.irs.gov/e-file-providers/e-file-for-char			setalis on	the elec	tronic
ning or u	IS IMIN, YOU W	ww.irs.gov/e-me-providers/e-me-for-char	mes-and-n	on-prones.			
Autom	atic 6-Mont	h Extension of Time. Only subn	nit origini	al (no copies needed).			
		to file an income tax return other than F equest an extension of time to file incom			IS, REMIC	s, and b	rusts
Type or	Name of ex	mpt organization or other flier, see instru	uctions.		Taxpaye	r identif	(TIN)
print	ROOTED	SCHOOL				47-	-1901769
File by the day date for		eet, and room or suite no. If a P.O. box, s	see instruct	tions.		-	
filing your return. See		T CHARLES AVE					
instructions.		post office, state, and ZIP code. For a f LEANS, LA 70130	oreign add	ress, see instructions.			
		or the return that this application is for (fi	-				0 1
Application Is For	on		Return	Application Is For			Return
	or Form 990-B	z	01	Form 990-T (corporation)			07
Form 990			02	Form 1041-A			08
Form 472	(individual)		03	Form 4720 (other than individual)			09
Form 990			04	Form 5227			10
	-T (sec. 401(a)		05	Form 6069 Form 8870			11
1 0111 224	r grade outer	ORGANIZATION		Tom our o			12
		tare of > 4238 ST. CHARL	ES AVE	ENUE - NEW ORLEANS,	LA	7011	5
		04-208-6571		Fax No.			
		es not have an office or place of business leturn, enter the organization's four digit					
box >		part of the group, check this box					
		atic 6-month extension of time until		Y 17, 2021 , to fix	e the exer	npt orga	anization return for
		amed above. The extension is for the org ear or	anization's	return for:			
	X tax year b	ginning JUL 1, 2019	an	dending JUN 30, 2020			
	-	red in line 1 is for less than 12 months, o ccounting period	theck reaso	on: 🛄 initial return 🛄	Final retu	m	
2 11 1			or 6069.	enter the tentative tax, less	3a	\$	0
3a 111		s for Forms 990-BL, 990-PF, 990-T, 4720 credits. See instructions.			00		
Sa ift any	nonrefundable			refundable credits and	04	1996	2
Sa ift any b ift est	nonrefundable his application imated tax pay	credits. See instructions. s for Forms 990-PF, 990-T, 4720, or 6069 ments made. Include any prior year over	9, enter any	owed as a credit.	30	\$	0
Sa Ire any b Ire c Da	nonrefundable his application imated tax pay lance due. Sut	credits. See instructions. s for Forms 990-PF, 990-T, 4720, or 6069 nents made. Include any prior year over tract line 8b from line 8a. Include your pa	9, enter any payment all ayment with	owed as a credit. h this form, if required, by	3b	5	
3a if ti any b if ti c Ba usi Caution:	nonrefundable his application imated tax pay lance due. Sut ing EFTPS (Elec if you are goin	credits. See instructions. s for Forms 990-PF, 990-T, 4720, or 6069 ments made. Include any prior year over	9, enter any payment all ayment with e Instructio	owed as a credit. h this form, if required, by ms.	3b 3c	\$ \$	0
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Sa If the any b If the estimate of the second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second secon	r nonrefundable nis application imated tax pay lance due. Sut ng EFTPS (Elec if you are goin ns.	credits. See Instructions. s for Forms 990-PF, 990-T, 4720, or 6063 nents made. Include any prior year overs tract line 3b from line 3a. Include your pa tronic Federal Tax Payment System). See	9, enter any payment all ayment with e instructio i (direct det	owed as a credit. h this form, if required, by ms. bit) with this Form 8868, see Form 8-	3b 3c		0

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213-1181

Attachment 25 CMO Organizational Performance Reports

ROOTED SCHOOL TABLE OF CONTENTS YEAR ENDED JUNE 30, 2018

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ROOTED SCHOOL

FINANCIAL STATEMENTS AND SUPPLEMENTARY INFORMATION

YEAR ENDED JUNE 30, 2018



INDEPENDENT AUDITORS' REPORT

Board of Directors Rooted School New Orleans, Louisiana

Report on the Financial Statements

We have audited the accompanying financial statements of Rooted School (the School), a nonprofit public benefit corporation, which comprise the statement of financial position as of June 30, 2018, and the related statements of activities, cash flows, and functional expenses for the year then ended, and the related notes to the financial statements.

Management's Responsibility for the Financial Statements

Management is responsible for the preparation and fair presentation of these financial statements in accordance with accounting principles generally accepted in the United States of America; this includes the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error.

Auditors' Responsibility

Our responsibility is to express an opinion on these financial statements based on our audit. We conducted our audit in accordance with auditing standards generally accepted in the United States of America and the standards applicable to financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States. Those standards require that we plan and perform the audit to obtain reasonable assurance about whether the financial statements are free of material misstatement.

An audit involves performing procedures to obtain audit evidence about the amounts and disclosures in the financial statements. The procedures selected depend on the auditor's judgment, including the assessment of the risks of material misstatement of the financial statements, whether due to fraud or error. In making those risk assessments, the auditor considers internal control relevant to the entity's preparation and fair presentation of the financial statements in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the entity's internal control. Accordingly, we express no such opinion. An audit also includes evaluating the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluating the overall presentation of the financial statements.

We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.



(1)

Board of Directors Rooted School

Opinion

In our opinion, the financial statements referred to on page one present fairly, in all material respects, the financial position of the School as of June 30, 2018, and the changes in its net assets and its cash flows for the year then ended in accordance with accounting principles generally accepted in the United States of America.

Other Matters

Other Information

Our audit was conducted for the purpose of forming an opinion on the School's financial statements as a whole. The accompanying schedule of compensation, benefits, and other payments to the agency head is presented for purposes of additional analysis and are not a required part of the basic financial statements. Such information is the responsibility of management and was derived from and relates directly to the underlying accounting and other records used to prepare the financial statements. The information has been subjected to the auditing procedures applied in the audit of the financial statements and certain additional procedures, including comparing and reconciling such information directly to the underlying accounting and other records used to prepare the financial statements or to the financial statements themselves, and other additional procedures in accordance with auditing standards generally accepted in the United States of America. In our opinion, the information is fairly stated, in all material respects, in relation to the financial statements as a whole.

The schedules required by Louisiana State Law, included as Schedules 1 through 9, are not a required part of the basic financial statements, but are supplementary information required by Louisiana State Law. Such information is the responsibility of management and was derived from and relates directly to the underlying accounting and other records used to prepare the combining financial statements. We have applied certain limited procedures, which are described in the Independent Accountants' Report on Applying Agreed-Upon Procedures. However, we did not audit this information and, accordingly, express no opinion on it.

Other Reporting Required by Government Auditing Standards

In accordance with Government Auditing Standards, we have also issued a report dated September 12, 2018 on our consideration of the School's internal control over financial reporting and on our tests of its compliance with certain provisions of laws, regulations, contracts, and grant agreements and other matters. The purpose of that report is to describe the scope of our testing of internal control over financial reporting and compliance and the results of that testing, and not to provide an opinion on the internal control over financial reporting or on compliance. That report is an integral part of an audit performed in accordance with Government Auditing Standards in considering the School's internal control over financial reporting and compliance.

Clifton Larson Allen LLP

CliftonLarsonAllen LLP

Glendora, California September 12, 2018

(2)

ROOTED SCHOOL STATEMENT OF FINANCIAL POSITION JUNE 30, 2018

ASSETS

CURRENT ASSETS Cash and Cash Equivalents	\$	164,919
Accounts Receivable - Federal and State		60,684
Total Current Assets		225,603
Total Assets	3	225.603
LIABILITIES AND NET ASSETS		
CURRENT LIABILITIES		
Accounts Payable and Accrued Liabilities	\$	25,280
Total Current Liabilities		25,280
NET ASSETS		
Unrestricted	\$	200,323
Total Net Assets		200,323
Total Liabilities and Net Assets	\$	225.603

ROOTED SCHOOL STATEMENT OF ACTIVITIES YEAR ENDED JUNE 30, 2018

REVENUES State and Local Public School Funding \$ 414,975 Federal Grants 235,631 853,550 Donations Other Income 541 Total Revenues 1,504,697 EXPENSES 1,161,056 Program Services Management and General 261,847 Total Expenses 1,422,903 CHANGE IN UNRESTRICTED NET ASSETS 81,794 118,529 Unrestricted Net Assets - Beginning of Year UNRESTRICTED NET ASSETS - END OF YEAR \$ 200.323

See accompanying Notes to Financial Statements.

(3)

See accompanying Notes to Financial Statements.

(4)

ROOTED SCHOOL STATEMENT OF CASH FLOWS YEAR ENDED JUNE 30, 2018

CASH FLOWS FROM OPERATING ACTIVITIES Change in Net Assets	\$	81,794
Adjustments to Reconcile Change in Net Assets to Net	4	01,104
Cash Flows Provided by Operating Activities:		
Change in Operating Assets:		
Accounts Receivable - Federal and State		(60,621)
Prepaid Expenses and Other Assets		2,082
Change in Operating Liabilities:		
Accounts Payable and Accrued Liabilities		16,432
Net Cash Flows Provided by Operating Activities		39,687
NET CHANGE IN CASH AND CASH EQUIVALENTS		39,687
Cash and Cash Equivalents - Beginning of Year		125,232
CASH AND CASH EQUIVALENTS - END OF YEAR	\$	164,919

ROOTED SCHOOL STATEMENT OF FUNCTIONAL EXPENSES YEAR ENDED JUNE 30, 2018

		Program Services		nagement d General	Total Expenses	
Salaries and Wages	\$	469,236	ŝ	141,583	5	610,819
Pension Expense		14,909		5,435		20,344
Other Employee Benefits		38,664		16,020		54,684
Payroll Taxes		35,438		10,223		45,661
Legal Expenses				5,426		5,426
Instructional Materials		235,166				235,166
Other Fees for Services		80,787		21,416		102,203
Advertising and Promotion Expenses		-		559		559
Office Expenses		-		5,385		5,385
Occupancy Expenses		150,290		-		150,290
Insurance Expense				9,589		9,589
Other Expenses		26,367		10,990		37,357
Total	5	1,161.056	S	261,847	S	1,422,903

(5)

See accompanying Notes to Financial Statements.

(6)

ROOTED SCHOOL NOTES TO FINANCIAL STATEMENTS JUNE 30, 2018

NOTE 1 SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES

Nature of Activities

The Rooted School (the School) was created as a nonprofit corporation under the laws of the State of Louisiana in 2014. The School applied to the Orleans Parish School Board to operate a Type I charter school. The Orleans Parish School Board approved the charter of the School for a period of five years commencing on July 1, 2017 and ending on June 30, 2022. The school serves eligible students in ninth through twelfth grade.

The School received approximately 43% of its total revenues from federal and state grantors.

Basis of Accounting

The financial statements have been prepared on the accrual method of accounting and accordingly reflect all significant receivables and liabilities.

Basis of Presentation

The accompanying financial statements have been prepared in conformity with accounting principles generally accepted in the United States as prescribed by the Financial Accounting Standards Board.

Net Asset Classes

The School is required to report information regarding its financial position and activities according to three classes of net assets: unrestricted, temporarily restricted, and permanently restricted. Net assets of the School are defined as:

<u>Unrestricted</u> – All resources over which the governing board has discretionary control to use in carrying on the general operations of the School.

<u>Temporarily Restricted</u> – These net assets are restricted by donors to be used for specific purposes. The School does not currently have any temporarily restricted net assets.

<u>Permanently Restricted</u> – These net assets are permanently restricted by donors and cannot be used by the School. The School does not currently have any permanently restricted net assets.

Cash and Cash Equivalents

The School defines its cash and cash equivalents to include only cash on hand, demand deposits, and liquid investments with original maturities of three months or less.

Use of Estimates

The preparation of financial statements in conformity with accounting principles generally accepted in the United States of America requires management to make estimates and assumptions that affect the reported amounts of assets, liabilities, and disclosures. Accordingly, actual results could differ from those estimates.

(7)

ROOTED SCHOOL NOTES TO FINANCIAL STATEMENTS JUNE 30, 2018

NOTE 1 SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (CONTINUED)

Receivables

Accounts receivable primarily represent amounts due from federal and state governments as of June 30, 2018. Management believes that all receivables are fully collectible, therefore no provisions for uncollectible accounts were recorded.

Compensated Absences

The School does not allow employees to carryover unused vacation. Accordingly, there were no accumulated compensated absence benefits at June 30, 2018.

Revenue

The School's primary sources of funding are through the State Public School Fund and federal grants, as well as private donations. Federal grants are recorded on a cost reimbursement basis. An accrual is made when eligible expenses are incurred.

Contributions

All contributions are considered to be available for unrestricted use unless specifically restricted by the donor. Amounts received that are restricted to specific use or future periods are reported as temporarily restricted. Restricted contributions that are received and released in the same period are reported as unrestricted revenue. Unconditional promises to give expected to be received in one year or less are recorded at net realizable value. Unconditional promises to give expected to be received in more than one year are recorded at fair market value at the date of the promise. Conditional promises to give are not recognized until they become unconditional, that is, when the conditions on which they depend are substantially met.

Income Taxes

The School is a nonprofit entity exempt from the payment of income taxes under Internal Revenue Code Section 501(c)(3). Accordingly, no provision has been made for income taxes. Management has determined that all income tax positions are more likely than not of being sustained upon potential audit or examination; therefore, no disclosures of uncertain income tax positions are required. The School files informational returns in the U.S. federal jurisdiction. The statute of limitations for federal purposes is generally three years.

Functional Allocation of Expenses

Costs of providing the School's programs and other activities have been presented in the statement of functional expenses. During the year, such costs are accumulated into separate groupings as either direct or indirect. Indirect or shared costs are allocated among program and support services by a method that best measures the relative degree of benefit.

Evaluation of Subsequent Events

The School has evaluated subsequent events through September 12, 2018, the date these financial statements were available to be issued.

(B)

ROOTED SCHOOL NOTES TO FINANCIAL STATEMENTS JUNE 30, 2018

NOTE 2 CONCENTRATION OF CREDIT RISK

The School maintains cash balances held in banks and revolving funds which are insured up to \$250,000 by the Federal Depository Insurance Corporation (FDIC). At times, cash in these accounts exceeds the insured amounts. The School has not experienced any losses in such accounts and believes it is not exposed to any significant credit risk on its cash and cash equivalents.

NOTE 3 EMPLOYEE RETIREMENT

Defined Contribution Plan

The School offers an Internal Revenue Code Section 401(k) retirement plan to each of its qualifying employees. Employer and employee contributions are used to purchase annuity contracts for each participant employee. Employer matching contributions are made as a percentage of elective deferrals for each employee who is eligible for employer contributions. Additionally, the employer may elect to make a discretionary contribution for each qualifying employee for each plan year. The amount of employer contributions used to purchase annuity contracts for the year ended June 30, 2018 was \$20,344.

NOTE 4 OPERATING LEASES

The School leases it facilities under several lease agreements where the last lease expires in June of 2019. Lease expense under these agreements for the year ended June 30, 2018 was \$90,000

Future minimum lease payments are as follows:





NOTE 5 CONTINGENCIES

The School has received state and federal funds for specific purposes that are subject to review and audit by the grantor agencies. Although such audits could generate disallowances under terms of the grants, it is believed that any required reimbursement would not be material.

(8)



INDEPENDENT AUDITOR'S REPORT ON INTERNAL CONTROL OVER FINANCIAL REPORTING AND ON COMPLIANCE AND OTHER MATTERS BASED ON AN AUDIT OF FINANCIAL STATEMENTS PERFORMED IN ACCORDANCE WITH GOVERNMENT AUDITING STANDARDS

Board of Directors Rooted School New Orleans, Louisiana

We have audited, in accordance with the auditing standards generally accepted in the United States of America and the standards applicable to financial audits contained in Government Auditing Standards issued by the Comptroller General of the United States, the financial statements of Rooted School (the School), a nonprofit public benefit corporation, which comprise the statement of financial position as of June 30, 2018, and the related statements of activities, cash flows, and functional expenses for the year then ended, and the related notes to the financial statements, and have issued our report thereon dated September 12, 2018.

Internal Control Over Financial Reporting

In planning and performing our audit of the financial statements, we considered the School's internal control over financial reporting (internal control) to determine the audit procedures that are appropriate in the circumstances for the purpose of expressing our opinion on the financial statements, but not for the purpose of expressing an opinion on the effectiveness of the School's internal control. Accordingly, we do not express an opinion on the effectiveness of the School's internal control.

A deficiency in internal control exists when the design or operation of a control does not allow management or employees, in the normal course of performing their assigned functions, to prevent or detect and correct misstatements on a timely basis. A material weakness is a deficiency or a combination of deficiencies in internal control such that there is a reasonable possibility that a material misstatement of the financial statements will not be prevented or detected and corrected on a timely basis. A significant deficiency is a deficiency, or a combination of deficiencies, in internal control that is less severe than a material weakness, yet important enough to merit attention by those charged with governance.

Our consideration of internal control was for the limited purpose described in the first paragraph of this section and was not designed to identify all deficiencies in internal control that might be material weaknesses or significant deficiencies. Given these limitations, during our audit we did not identify any deficiencies in internal control that we consider to be material weaknesses. However, material weaknesses may exist that have not been identified.



(10)

Board of Directors Rooted School

Compliance and Other Matters

As part of obtaining reasonable assurance about whether the School's financial statements are free from material misstatement, we performed tests of its compliance with certain provisions of laws, regulations, contracts, and grant agreements, noncompliance with which could have a direct and material effect on the determination of financial statement amounts. However, providing an opinion on compliance with those provisions was not an objective of our audit, and accordingly, we do not express such an opinion. The results of our tests disclosed no instances of noncompliance or other matters that are required to be reported under *Government Auditing Standards*.

Purpose of this Report

The purpose of this report is solely to describe the scope of our testing of internal control and compliance and the results of that testing, and not to provide an opinion on the effectiveness of the entity's internal control or on compliance. This report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering the entity's internal control and compliance. Accordingly, this communication is not suitable for any other purpose.

Clifton Larson Allen LLP

CliftonLarsonAllen LLP

Glendora, California September 12, 2018 ROOTED SCHOOL SCHEDULE OF FINDINGS YEAR ENDED JUNE 30, 2018

There were no findings for the year ended June 30, 2018.

(12)

ROOTED SCHOOL SCHEDULE OF PRIOR YEAR FINDINGS YEAR ENDED JUNE 30, 2018

There were no findings for the year ended June 30, 2017 as this is the first year of operations.

ROOTED SCHOOL SCHEDULE OF COMPENSATION, BENEFITS, AND OTHER PAYMENTS TO THE AGENCY HEAD YEAR ENDED JUNE 30, 2018

Agency Head: Jonathan Johnson

Purpose	Amount
Salary	\$ 90,000
Benefits - Employer Portion of Retirement	4,229
Benefits - Employer Portion of Medical/Dental/Vision	4,359
Travel	
Cell Phone Reimbursement	-
Reimbursements	
Conferences	-
Benefits - FICA Medicare	10,072
Other Compensation-Security	
Community Relations	
Professional Development	
Total	\$ 108,660

(14)



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INDEPENDENT ACCOUNTANTS' REPORT ON APPLYING AGREED-UPON PROCEDURES

Board of Directors Rooted School New Orleans, Louisiana

We have performed the procedures enumerated below, which were agreed to by Rooted School (the School); the Louisiana Department of Education, and the Louisiana Legislative Auditor (the specified parties), on the performance and statistical data accompanying the annual financial statements of the School for the fiscal year ended June 30, 2018; and to determine whether the specified schedules are free of obvious errors and omissions as provided by the Board of Elementary and Secondary Education (BESE) Bulletin 126, in compliance with Louisiana Revised Statute 24:514 I. Management of the School is responsibile for its performance and statistical data. The sufficiency of these procedures is solely the responsibility of the specified parties. Consequently, we make no representation regarding the sufficiency of the procedures enumerated below either for the purpose for which this report has been requested or for any other purpose.

Our procedures and findings relate to the accompanying schedules of supplemental information and are as follows:

General Fund Instructional and Support Expenditures and Certain Local Revenue Sources (Schedule 1)

- We selected a random sample of 25 transactions and reviewed supporting documentation to determine if the sampled expenditures/revenues are classified correctly, based on description and nature of the revenue/expense, and are reported in the proper amounts for each of the following amounts reported on the schedule:
 - · Total General Fund Instructional Expenditures,
 - · Total General Fund Equipment Expenditures,
 - · Total Local Taxation Revenue,
 - · Total Local Earnings on Investment in Real Property,
 - · Total State Revenue in Lieu of Taxes,
 - · Nonpublic Textbook Revenue, and
 - · Nonpublic Transportation Revenue.

Findings: None.



(15)

SCHEDULES REQUIRED BY LOUISIANA STATE LAW

(R.S. 24:514 - PERFORMANCE AND STATISTICAL DATA)

Board of Directors Rooted School

Education Levels of Public School Staff (Schedule 2)

- 2. We reconciled the total number of full-time classroom teachers per the schedule "Experience of Public Principals, Assistant Principals, and Full-time Classroom Teachers" (Schedule 4) to the combined total number of full-time classroom teachers per this schedule and to school board supporting payroll records as of October 1st.
- 3. We reconciled the combined total of principals and assistant principals per the schedule "Experience of Public Principals, Assistant Principals, and Full-time Classroom Teachers" (Schedule 4) to the combined total of principals and assistant principals per this schedule.
- 4. We obtained a list of full-time teachers, principals, and assistant principals by classification as of October 1st and as reported on the schedule. We traced all teachers to the individual's personnel file and determine if the individual's education level was accurately classified on the schedule.

Findings:

None. There were no differences noted.

Number and Type of Public Schools (Schedule 3)

 We obtained a list of schools by type as reported on the schedule. We compared the list to the schools and grade levels as reported on the Title 1 Grants to Local Educational Agencies (CFDA 84.010) application and/or the National School Lunch Program (CFDA 10.555) application.

Findings: None

Experience of Public Principals, Assistant Principals, and Full-time Classroom Teachers (Schedule 4)

6. We obtained a list of full-time teachers, principals, and assistant principals by classification as of October 1st and as reported on the schedule and traced the same sample used in Procedure 4 to the individual's personnel file and determined if the individual's experience was accurately classified on the schedule.

Findings:

None.

Public School Staff Data: Average Salaries (Schedule 5)

- 7. We obtained a list of all classroom teachers including their base salary, extra compensation, and ROTC or rehired retiree status as well as full-time equivalent as reported on the schedule and traced all teachers to the individual's personnel file and determined if the individual's salary, extra compensation, and full-time equivalents were accurately included on the schedule.
- 8. We recalculated the average salaries and full-time equivalents reported in the schedule.

Findings: None

Class Size Characteristics (Schedule 6)

9. We obtained a list of classes by school, school type, and class size as reported on the schedule and reconciled school type classifications to Schedule 3 data, as obtained in Procedure 5. We then traced all classes to the October 1st roll books for those classes and determined if the class was accurately classified on the schedule.

Findings:

None.

(16)

Board of Directors Rooted School

Louisiana Educational Assessment Program (LEAP) (Schedule 7)

10. We obtained test scores as provided by the testing authority and reconciled scores as reported by the testing authority to scores reported in the schedule by (Any Parish School Board).

Findings:

Not applicable.

Graduation Exit Examination (GEE) (Schedule 8)

- 11. We obtained test scores as provided by the testing authority and reconciled scores as reported by the testing authority to scores reported in the schedule by the School.
 - The Graduation Examination (GEE) is no longer administered. (This schedule is no longer applicable.)

iLEAP Tests (Schedule 9)

- 12. We obtained test scores as provided by the testing authority and reconciled scores as reported by the testing authority to scores reported in the schedule by the School.
 - Findings: None

None

This agreed-upon procedures engagement was performed in accordance with attestation standards established by the American Institute of Certified Public Accountants, and the standards applicable to attestation engagements contained in Government Auditing Standards, issued by the United States Comptroller General. We were not engaged to and did not conduct an examination or review, the objective of which would be the expression of an opinion or conclusion, respectively, on the performance and statistical data. Accordingly, we do not express such an opinion or conclusion. Had we performed additional procedures, other matters might have come to our attention that would have been reported to you.

The purpose of this report is solely to describe the scope of testing performed on the performance and statistical data accompanying the annual financial statements of the School, as required by Louisiana Revised Statue 24:514.1, and the result of that testing, and not to provide an opinion on control or compliance. Accordingly, this report is not suitable for any other purpose. Under Louisiana Revised Statute 24:513, this report is distributed by the Louisiana Legislative Auditor as a public document.

Clifton Larson Allen LLP

CliftonLarsonAllen LLP

Glendora, California September 12, 2018

(17)

ROOTED SCHOOL GENERAL FUND INSTRUCTIONAL AND SUPPORT EXPENDITURES AND CERTAIN LOCAL REVENUE SOURCES SCHEDULE 1 YEAR ENDED JUNE 30, 2018 (SEE INDEPENDENT ACCOUNTANTS' REPORT ON AGREED-UPON PROCEDURES.)

General Fund Instructional and Equipment Expenditures	Column A	C	olumn B
Seneral Fund Instructional Expenditures:			
Teacher and Student Interaction Activities:			
Classroom Teacher Salaries	236,750		
Other Instructional Staff Activities	1,467		
Instructional Staff Employee Benefits	58,649		
Purchased Professional and Technical Services	29,335		
instructional Materials and Supplies	207,247		
Instructional Equipment	10,875		
Total Teacher and Student Interaction Activities		\$	544,323
Other Instructional Activities			
Pupil Support Services	8,096		
Less: Equipment for Pupil Support Services			
Net Pupil Support Services			8,096
Instructional Staff Services	16,943		
Less: Equipment for Instructional Staff Services			
Net Instructional Staff Services			16,943
School Administration	445,661		
Less: Equipment for School Administration	(991)		
Net School Administration			444,670
Total General Fund Instructional Expenditures			
(Total of Column B)		\$	1,014,032
Total General Fund Equipment Expenditures			
(Object 730; Functional Series 1000-4000)		\$	9,884
ocal Revenue Sources	-13-0 (2), (2) (2)		
Earnings on Investments:			
Interest on Investments		\$	8
Other Revenue from Local Sources:			
Contributions and Donations			853,550
Revenue from Judgements/Court Orders			
discellaneous Revenues:			
Other Miscellaneous Revenues			541
Total Revenues from Local Sources		\$	854,091

ROOTED SCHOOL EDUCATION LEVELS OF PUBLIC SCHOOL STAFF SCHEDULE 2 YEAR ENDED JUNE 30, 2018 (SEE INDEPENDENT ACCOUNTANTS' REPORT ON AGREED-UPON PROCEDURES.)

Category	Full-t	ime Class	room Tea	chers	Princip	xalis & Ass	sistant Prir	ncipals
	Certif	icated	Uncert	ficated	Certif	cated	Uncertificated	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Less than a Bachelor's Degree		0%		0%		0%		0%
Bachelor's Degree	1	100%	2	67%	1	33%		0%
Master's Degree		0%	1	33%	1	33%		0%
Master's Degree + 30		0%		0%	1	33%		0%
Specialist in Education		0%		0%		0%		0%
Pd.D or Ed. D		0%		0%		0%		0%
Total	1	100%	3	100%	3	100%	0	0%

(19)

(18)

ROOTED SCHOOL NUMBER AND TYPE OF PUBLIC SCHOOLS SCHEDULE 3 YEAR ENDED JUNE 30, 2018 (SEE INDEPENDENT ACCOUNTANTS' REPORT ON AGREED-UPON PROCEDURES.)

Туре	Number
Elementary	
Middle Jr. High	
Secondary	1
Combination	
Total	1

ROOTED SCHOOL EXPERIENCE OF PUBLIC PRINCIPALS, ASSISTANT PRINCIPALS, AND FULLTIME CLASSROOM TEACHERS SCHEDULE 4 YEAR ENDED JUNE 30, 2018 (SEE INDEPENDENT ACCOUNTANT'S REPORT ON AGREED-UPON PROCEDURES.)

	0-1 Yr.	2-3 Yrs.	4-10 Yrs.	11-14 Yrs.	15-19 Yrs.	20-24 Yrs.	25+ Yrs.	Total
Assistant Principals			1				1	2
Principals		1						1
Classroom Teachers			4					4
Total	0	1	5	0	0	0	1	7

(20)

(21)

ROOTED SCHOOL PUBLIC SCHOOL STAFF DATA: AVERAGE SALARIES SCHEDULE 5 YEAR ENDED JUNE 30, 2018 (SEE INDEPENDENT ACCOUNTANTS' REPORT ON AGREED-UPON PROCEDURES.)

All Classroom Teachers

59,500.00 \$

59,500.00 \$

\$

\$

Average Classroom Teachers Salary

Including Extra Compensation Average Classroom Teachers Salary Excluding Extra Compensation

Number of Teacher Full-time Equivalents (FTES) used in Computation of Average Salaries Classroom Teachers, Excluding ROTC, Rehired Retirees and Flagged Salary Reductions

59,500.00

59,500.00

ROOTED SCHOOL
CLASS SIZE CHARACTERISTICS
SCHEDULE 6
YEAR ENDED JUNE 30, 2018
(SEE INDEPENDENT ACCOUNTANTS' REPORT ON AGREED-UPON PROCEDURES.)

	Class Size Range										
School Type	1-	1-20		21-26		27-33		4+			
	Number	Percent	Number	Percent	Number	Percent	Number	Percent			
Elementary	1										
Elementary Activity Class	1										
Middle High	1										
Middle High Activity Class	1										
High	2	100%									
High Activity Class	1										
Combination	1										
Combination Activity Class	1										

(23)

(22)

ROOTED SCHOOL LOUISIANA EDUCATIONAL ASSESSMENT PROGRAM (LEAP) SCHEDULE 7 YEAR ENDED JUNE 30, 2018 (SEE INDEPENDENT ACCOUNTANTS' REPORT ON AGREED-UPON PROCEDURES.)

District Achievement	English Language Arts							Mathematics					
Level Results	2018		2017		2016		2018		2017		2016		
Students	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent	
Grade 4													
Advanced	N/A	N/A	N/A	N/A	N/A.	N/A	N/A	N/A.	N/A	N/A	N/A	N/A	
Mastery	N/A	N/A	N/A	N/A	N/A.	N/A	N/A	N/A.	N/A	NVA	N/A	N/A	
Basic	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	
Approaching Basic	N/A	N/A	N/A	N/A	N/A	N/A	N/A	NA	N/A	N/A	N/A	N/A	
Unsatisfactory	N/A	N/A	N/A	N/A	N/A.	N/A	N/A	N/A.	N/A	N/A	N/A	N/A	
Total	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	

District Achievement			Scie	ence					Social	Studies		
Level Results	2018		20)17	20	2016		2018		017	20	18
Students	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Grade 4	1											
Advanced	N/A	N/A	N/A	N/A	N/A.	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Mastery	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A.	N/A	N/A	N/A	N/A
Basic	N/A	N/A										
Approaching Basic	N/A	N/A										
Unsatisfactory	N/A,	N/A	N/A	N/A								
Total	N/A	N/A.	N/A	N/A								

District Achievement		E	inglish Lar	nguage Ar	ts				Mathe	matics		
Level Results Students	2018		20	17	2016		2018		2017		2016	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Grade 8												
Advanced	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Mastery	N/A	N/A	N/A	N/A	N/A.	N/A	N/A	N/A	N/A	NVA	N/A	N/A
Basic	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Approaching Basic	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Unsatisfactory	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A,	N/A	N/A
Total	N/A	N/A	N/A	N/A	N/A	N/A	N/A	NA	N/A	N/A	N/A	N/A

District Achievement			Scie	ence								
Level Results	20	2018)17	20	116	20	18	2017		20	16
Students	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Grade 8												
Advanced	N/A	N/A	N/A	N/A.	N/A.	N/A	N/A	N/A.	N/A	N/A.	N/A	N/A
Mastery	N/A	N/A										
Basic	N/A	N/A	N/A	N/A	N/A.	N/A	N/A	N/A.	N/A	N/A	N/A	N/A
Approaching Basic	N/A	N/A										
Unsatisfactory	N/A	N/A										
Total	N/A	N/A	N/A	N/A	N/A	N/A	N/A	NA	N/A	N/A	N/A	N/A

ROOTED SCHOOL GRADUATION EXIT EXAM SCHEDULE 8 YEAR ENDED JUNE 30, 2018 (SEE INDEPENDENT ACCOUNTANTS' REPORT ON AGREED-UPON PROCEDURES.)

The Graduation Exit Examination is no longer administered. The Schedule is no longer applicable.

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ROOTED SCHOOL iLEAP TESTS SCHEDULE 9 YEAR ENDED JUNE 30, 2018 (SEE INDEPENDENT ACCOUNTANTS' REPORT ON AGREED-UPON PROCEDURES.)

District Achievement Level	English Lar	iguage Arts	Mathe	matics	Scie	ence	Social	Studies
Results	20	118	20	118	20	18	20	118
Grade 3 Students	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Advanced	N/A	N/A	NIA	N/A	NGA	N/A	N/A.	N/A
Mastery	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Basic	N/A	N/A	NJ6A	N/A	91/A	N/A	N/A	N/A
Approaching Basic	N/A	N/A	N/A	N/A	MA	N/A	NA	N/A
Unsatisfactory	N/A	N/A.	NIA	N/A	N/A	N/A	N/A	N/A
Total	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A

District Achievement Level	English La	nguage Arts	Mathe	matics	Scie	ence	Social	Studies
Results	2018		20	2018		2018)18
Grade 5 Students	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Advanced	N/A	N/A	N/A	N/A	N/A	N/A	M/A	N/A
Mastery	N/A	N/A.	N/A	N/A	N/A	N/A	N/A	N/A
Basic	N/A	N/A.	NI(A	N/A	NIGA	N/A	N/A	N/A
Approaching Basic	N/A.	N/A	N/A	N/A	N/A	N/A	11/A	N/A
Unsatisfactory	N/A	N/A	N/A.	N/A	N/A	N/A	N/A	N/A
Total	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A

District Achievement Level	English Lar	English Language Arts		matics	Science		Social	Studies	
Results	20	18	20	18	20	18	20	18	
Grade 6 Students	Number	Percent	Number	Percent	Number	Percent	Number	Percent	
Advanced	N/A	N/A	N/A.	N/A	N/A.	N/A	N/A	N/A.	
Mastery	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	
Basic	N/A.	N/A	N/A	N/A	N/A	N/A	N/A	N/A	
Approaching Basic	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	
Unsatisfactory	N/A	N/A	N/A	N/A	N/A	N/A	M/A	N/A	
Total	N/A	N/A	NGA	N/A	N/A	N/A	MGA	N/A	

District Achievement Level	English Lar	iguage Arts	Mathe	matics	Science		Social Studies	
Results	2018		2018		2018		2018	
Grade 7 Students	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Advanced	N/A	N/A	N/A	N/A	N/A	N/A	N/A,	N/A
Mastery	N/A.	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Basic	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Approaching Basic	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Unsatisfactory	N/A.	N/A	N/A.	N/A	N/A	N/A	N/A	N/A
Total	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A

ROOTED SCHOOL iLEAP TESTS (CONTINUED) SCHEDULE 9 YEAR ENDED JUNE 30, 2018 (SEE INDEPENDENT ACCOUNTANTS' REPORT ON AGREED-UPON PROCEDURES.)

District Achievement Level	English Lar	English Language Arts		matics	Scie	ance	Social	Studies
Results	2017		2017		2017		2017	
Grade 3 Students	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Advanced	N/A	N/A	N/A	N/A	NGA	N/A	N/A	N/A
Mastery	N/A	N/A	N/A	N/A	NA	N/A	N/A	N/A
Basic	N/A	N/A	N/A	N/A	91/A	N/A	N/A	N/A
Approaching Basic	N/A	N/A	N/A	N/A	N/A	N/A	NA	N/A
Unsatisfactory	N/A	N/A	NIA	N/A	N/A	N/A	N/A	N/A
Total	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A

District Achievement Level	English Lar	English Language Arts		matics	Science		Social	Studies
Results	2017		2017		2017		2017	
Grade 5 Students	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Advanced	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Mastery	N/A	N/A	N/A	N/A	N/A	N/A	NA	N/A
Basic	N/A	N/A	NIA	N/A	N/A	N/A	N/A	N/A
Approaching Basic	N/A	N/A	NIGA.	N/A	N/A	N/A	N/A	N/A
Unsatisfactory	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A.
Total	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A

District Achievement Level	English Language Arts		Mathe	matics	Scie	ince	Social	Studies	
Results	20	17	20	117	20	17	20	17	
Grade 6 Students	Number	Percent	Number	Percent	Number	Percent	Number	Percent	
Advanced	N/A.	N/A	N/A	N/A	N/A.	N/A	NA	N/A	
Mastery	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	
Basic	N/A.	N/A	N/A	N/A	N/A	N/A	N/A	N/A	
Approaching Basic	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	
Unsatisfactory	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	
Total	N/A	N/A	N/64	N/A	N/A	N/A	NGA	N/A	

District Achievement Level	English Lat	English Language Arts		matics	Scit	ince	Social	Studies
Results	2017		2017		2017		2017	
Grade 7 Students	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Advanced	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Mastery	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Basic	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Approaching Basic	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Unsatisfactory	N/A.	N/A	N/A.	N/A	N/A	N/A	N/A	N/A
Total	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A

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ROOTED SCHOOL iLEAP TESTS (CONTINUED) SCHEDULE 9 YEAR ENDED JUNE 30, 2018 (SEE INDEPENDENT ACCOUNTANTS' REPORT ON AGREED-UPON PROCEDURES.)

District Achievement Level	English Language Arts 2016		Mathematics		Scie	ance	Social Studies	
Results			20	116	20	16	2016	
Grade 3 Students	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Advanced	N/A	N/A	NA	N/A	NIGA	N/A	N/A	N/A
Mastery	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Basic	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Approaching Basic	N/A	N/A.	NGA	N/A	N/64	N/A	NGA	N/A
Unsatisfactory	N/A	N/A.	N/A	N/A	N/A	N/A	N/A	N/A
Total	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A

District Achievement Level	English Language Arts 2016		Mathematics		Scie	Incé	Social Studies	
Results			20	116	20	16	2016	
Grade 5 Students	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Advanced	N/A	N/A	NGA	N/A	N/A	N/A	N/A	N/A
Mastery	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Basic	N/A	N/A	NICA	N/A	NIGA	N/A,	N/A	N/A
Approaching Basic	N/A	N/A	N10A	N/A	N/A	N/A	346A.	N/A
Unsatisfactory	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Total	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A

District Achievement Level	English Lar	iguage Arts	Mathe	matics	Scie	ince	Social Studies	
Results	2016		20	116	20	16	2016	
Grade 6 Students	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Advanced	N/A.	N/A	NIA	N/A	N/A.	N/A	N/A	N/A
Mastery	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Basic	N/A.	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Approaching Basic	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Unsatisfactory	N/A	N/A	NI(A	N/A	N/A	N/A	N/A	N/A
Total	N/A	N/A	NIGA.	N/A	N/A.	N/A	MA	N/A

District Achievement Level	English Language Arts 2016		Mathematics 2016		Science 2016		Social Studies 2016	
Results								
Grade 7 Students	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Advanced	N/A	N/A	N/A	N/A	N/A	N/A	N/A,	N/A
Mastery	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Basic	N/A	N/A,	N/A	N/A	N/A	N/A	N/A	N/A
Approaching Basic	N/A	N/A	N/6A	N/A	N/A	N/A	N/A	N/A
Unsatisfactory	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Total	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A

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INDEPENDENT ACCOUNTANT'S REPORT ON APPLYING AGREED-UPON PROCEDURES

Board of Directors Rooted School New Orleans, LA

We have performed the procedures enumerated below, which were agreed to by Rooted School (the School) and the Legislative Auditor, State of Louisiana, to assist the entity in complying with the requirements of the Louisiana Legislative Auditor's (LLA) Statewide Agreed-Upon Procedures (SAUPs) for the fiscal year ended June 30, 2018. The School's management is responsible for compliance with these requirements. The sufficiency of these procedures is solely the responsibility of the specified users of this report. Consequently, we make no representation regarding the sufficiency of the procedures (described below either for the purpose for which this report has been requested or for any other purpose.

Our procedures and findings are as follows:

Written Policies and Procedures

- CLA obtained Rooted School's written policies and procedures and observed if those written policies and procedures addressed each of the following financial/business functions:
 - a) Budgeting, including preparing, adopting, monitoring, and amending the budget
 - b) Purchasing, including (1) how purchases are initiated; (2) how vendors are added to the vendor list; (3) the preparation and approval process of purchase requisitions and purchase orders; (4) controls to ensure compliance with the public bid law; and (5) documentation required to be maintained for all bids and price quotes.
 - c) Disbursements, including processing, reviewing, and approving
 - d) Receipts, including receiving, recording, and preparing deposits Also, policies and procedures should include management's actions to determine the completeness of all collections for each type of revenue or agency fund additions (e.g. periodic confirmation with outside parties, reconciliation to utility billing after cutoff procedures, reconciliation of traffic ticket number sequences, agency fund forfeiture monies confirmation).
 - Payroll/Personnel, including (1) payroll processing, and (2) reviewing and approving time and attendance records, including leave and overtime worked.
 - f) Contracting, including (1) types of services requiring written contracts, (2) standard terms and conditions, (3) legal review, (4) approval process, and (5) monitoring process



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- g) Credit Cards (and debit cards, fuel cards, P-Cards, if applicable), including (1) how cards are to be controlled, (2) allowable business uses, (3) documentation requirements, (4) required approvers, and (5) monitoring card usage
- h) Travel and expense reimbursement, including (1) allowable expenses, (2) dollar thresholds by category of expense, (3) documentation requirements, and (4) required approvers
- i) Ethics, including (1) the prohibitions as defined in Louisiana Revised Statute 42:1111-1121, (2) actions to be taken if an ethics violation takes place, (3) system to monitor possible ethics violations, and (4) requirement that all employees, including elected officials, annually attest through signature verification that they have read the entity's ethics policy. Note: Ethics requirements are not applicable to nonprofits.
- j) Debt Service, including (1) debt issuance approval, (2) EMMA reporting requirements, (3) debt reserve requirements, and (4) debt service requirements.

Results: The written policies and procedures addressed each of the above financial/business functions.

Board or Finance Committee

- CLA obtained and read the board/finance committee minutes for the fiscal period, as well as the board's enabling legislation, charter, bylaws, or equivalent document in effect during the fiscal period, and:
 - CLA observed that the managing board met (with a quorum) at least monthly, or on a frequency in accordance with the board's enabling legislation, charter, or other equivalent document.
 - b) CLA observed that the minutes referenced or included financial activity relating to public funds.
 - c) Results: The board minutes reviewed met with a quorum at least monthly. Those minutes referenced included monthly budget-to-actual comparisons and financial activity relating to public funds.

Bank Reconciliations

- CLA obtained a listing of client bank accounts from management and management's representation that the listing is complete.
- 4. Using the listing provided by management, CLA selected all of the entity's bank accounts (if five accounts or less) or one-third of the bank accounts on a three year rotating basis (if more than 5 accounts). For each of the bank accounts selected, CLA obtained bank statements and reconciliations for all months in the fiscal period and report whether:
 - a) Bank reconciliations have been prepared;
 - Bank reconciliations include evidence that a member of management or a board member (with no involvement in the transactions associated with the bank account) has reviewed each bank reconciliation; and

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INDEPENDENT ACCOUNTANT'S REPORT ON APPLYING AGREED-UPON PROCEDURES

c) If applicable, management has documentation reflecting that it has researched reconciling items that have been outstanding for more than 12 months as of the end of the fiscal period.

Results: Bank reconciliations were prepared. Bank reconciliations included evidence that a member of management or a board member (with no involvement in the transactions associated with the bank account) has reviewed each bank reconciliation. There were no reconciling items that have been outstanding for more than 12 months as of the end of the fiscal period.

Collections

- Obtain a listing of deposit sites for the fiscal period where deposits for cash/checks/money orders (cash) are prepared and management's representation that the listing is complete. Randomly select 5 deposit sites (icor all deposit sites if less than 5).
- 6. For each deposit site selected, obtain a listing of collection locations and management's representation that the listing is complete. Randomly select one collection location for each deposit site (i.e. 5 collection locations for 5 deposit sites), obtain and inspect written policies and procedures relating to employee job duties (if no written policies or procedures, inquire of employees about their job duties) at each collection location, and observe that job duties are properly segregated at each collection location such that:
 - a) Employees that are responsible for cash collections do not share cash drawers/registers.
 - b) Each employee responsible for collecting cash is not responsible for preparing/making bank deposits, unless another employee/official is responsible for reconciling collection documentation (e.g. pre-numbered receipts) to the deposit.
 - c) Each employee responsible for collecting cash is not responsible for posting collection entries to the general ledger or subsidiary ledgers, unless another employee/official is responsible for reconciling ledger postings to each other and to the deposit.
 - d) The employee(s) responsible for reconciling cash collections to the general ledger and/or subsidiary ledgers, by revenue source and/or agency fund additions are not responsible for collecting cash, unless another employee verifies the reconciliation.
- Inquire of management that all employees who have access to cash are covered by a bond or insurance policy for theft.
- 8. Randomly select two deposit dates for each of the 5 bank accounts selected for procedure #3 under "Bank Reconciliations" above (select the next deposit date chronologically if no deposits were made on the dates randomly selecte and randomly select a deposit if multiple deposits are made on the same day). Alternately, the practitioner may use a source document other than bank statements when selecting the deposit dates for testing, such as a cash collection log, daily revenue report, receipt book, etc. Obtain supporting documentation for each of the 10 deposits and:
 - a) Observe that receipts are sequentially pre-numbered.
 - b) Trace sequentially pre-numbered receipts, system reports, and other related collection documentation to the deposit slip.
 - c) Trace the deposit slip total to the actual deposit per the bank statement.

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- d) Observe that the deposit was made within one business day of receipt at the collection location (within one week if the depository is more than 10 miles from the collection location or the deposit is less than \$100.
- e) Trace the actual deposit per the bank statement to the general ledger

Results: Written documentation specifies that the persons responsible for collecting cash are covered by insurance policies. The only cash collection site is the main office of the School. Due to the low amount of cash collection activity and the limited number of office personnel at the School, the responsibilities of depositing cash and reconciling the bank accounts are performed by the same individual but are separated from the collection of cash and the recording of transactions.

Written documentation specifies that the entity has a formal process to reconcile cash collections to the general ledger and/or subsidiary ledgers, by revenue source and/or agency fund additions, by a person who is not responsible for cash collections in the cash collection location selected.

The selected deposit dates were traced to complete collection documentation, deposit slips, and bank statements. We traced daily collections to the deposit date on the corresponding bank statement and noted the deposits were not made within one day of collection due to the low amount of cash collection activity at the School.

Written documentation specifies that the entity has a formal process to reconcile cash collections to the general ledger and/or subsidiary ledgers, by revenue source and/or agency fund additions.

Non-Payroll Disbursements (excluding card purchases/payments, travel reimbursements, and petty cash purchases)

- CLA obtained a listing of locations that process payments for the fiscal period and management's representation that the listing is complete. At this time there is only one disbursement location. CLA obtained management's representation that the listing or general ledger population is complete.
- CLA obtained a listing of those employees involved with non-payroll purchasing and payment functions and written policies and procedures relating to employee job duties are poperly segregated such that:
- At least two employees are involved in initiating a purchase request, approving a purchase, and placing an order/making the purchase.
- b) At least two employees are involved in processing and approving payments to vendors.
- c) The employee responsible for processing payments is prohibited from adding/modifying vendor files, unless another employee is responsible for periodically reviewing changes to vendor files.
- d) Either the employee/official responsible for signing checks mails the payment or gives the signed checks to an employee to mail who is not responsible for processing payments.

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INDEPENDENT ACCOUNTANT'S REPORT ON APPLYING AGREED-UPON PROCEDURES

- 10. Using non-payroll disbursement transaction population from #8 above, CLA randomly selected 25 disbursements, non-payroll disbursement transaction population (excluding cards and travel reimbursements) and obtained supporting documentation (e.g. purchase requisitions, system screens/logs) for each transaction and verified that the supporting documentation for each transaction demonstrated that:
 - a) Observed that the disbursement matched the related original invoice/billing statement.
 - b) Observed that the disbursement documentation included evidence (e.g., initial/date, electronic logging) of segregation of duties tested under #9, as applicable.

Results: At least two employees are involved in initiating a purchase request, approving a purchase, and placing an order/making the purchase. At least two employees are involved in processing and approving payments to vendors. The employee responsible for processing payments is prohibited from adding/modifying vendor files, unless another employee is responsible for periodically reviewing changes to vendor files. The employee/official responsible for signing checks mails the payment or gives the signed checks to an employee to mail who is not responsible for processing payments.

The sample purchases were initiated using a requisition/purchase order system that separates initiation from approval functions in the same manner as a requisition/purchase order system without exception. Sampled purchase orders, or an electronic equivalent, were approved by a person who did not initiate the purchase. Payments for purchases were not processed without an approved requisition and/or purchase order, or electronic equivalent, a receiving report showing receipt of goods purchased, or electronic equivalent; an approved invoice, as applicable.

Credit Cards/Debit Cards/Fuel Cards/P-Cards

11. CLA obtained from management a listing of all active credit cards, bank debit cards, fuel cards, and P-cards (cards), including the card numbers and the names of the persons who maintained possession of the cards. CLA obtained management's representation that the listing is complete.

Results: The School did not use any credit cards, bank debit cards, fuel cards, and P-cards (cards) during the year.

- 12. Using the listing prepared by management, CLA randomly selected 5 cards (or all cards if less than 5) that were used during the fiscal period. CLA randomly selected one monthly statement or combined statement for each card (for a debit card, randomly select one monthly bank statement), obtain supporting documentation, and:
 - a) Observed there was evidence that the monthly statement or combined statement and supporting documentation was reviewed and approved, in writing, by someone other than the authorized card holder.
 - b) Observed no finance charges and/or late fees were assessed on the selected statements.

Results: N/A - The School did not use any credit cards, bank debit cards, fuel cards, and P-cards (cards) during the year.

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- 13. Using the monthly statements or combined statements selected under #12 above, CLA obtained supporting documentation for all transactions for each of the cards selected.
 - a) For each transaction, CLA observed the transaction was supported by:
 - > An original itemized receipt (i.e., identifies precisely what was purchased)
 - Documentation of the business/public purpose. For meal charges, there should also be documentation of the individuals participating.
 - b) For each transaction, CLA compared the transaction's detail (nature of purchase, dollar amount of purchase, supporting documentation) to the entity's written purchasing/disbursement policies and the Louisiana Public Bid Law (i.e. transaction is a large or recurring purchase requiring the solicitation of bids or quotes) without exception.
 - c) For each transaction, CLA compared the entity's documentation of the business/public purpose to the requirements of Article 7, Section 14 of the Louisiana Constitution, which prohibits the loan, pledge, or donation of funds, credit, property, or things of value without exception.

Results: N/A - The School did not use any credit cards, bank debit cards, fuel cards, and P-cards (cards) during the year.

Travel and Travel-Related Expense Reimbursements (excluding card transactions)

- 14. CLA obtained the general ledger and sorted/filtered for travel reimbursements. CLA obtained management's representation that the listing or general ledger is complete. CLA randomly selected 5 reimbursements, obtain the related expense reimbursement forms/prepaid expense documentation of each selected reimbursement, as well as the supporting documentation. For each of the 5 reimbursements selected:
 - a) If reimbursed using a per diem, agree the reimbursement rate to those rates established either by the State of Louisiana or the U.S. General Services Administration (www.gsa.gov).
 - b) If reimbursed using actual costs, observe that the reimbursement is supported by an original itemized receipt that identifies precisely what was purchased.
 - c) Observe that each reimbursement is supported by documentation of the business/public purpose (for meal charges, observe that the documentation includes the names of those individuals participating) and other documentation required by written policy (procedure #1h).
 - Observe that each reimbursement was reviewed and approved, in writing, by someone other than the person receiving reimbursement.

Results: CLA obtained the general ledger and sorted/filtered for travel reimbursements. CLA obtained management's representation that the listing or general ledger is complete. CLA obtained the entity's written policies related to travel and expense reimbursements and compared the amounts in the policies to the per diem and mileage rates established by the U.S. General Services Administration (www.gss.gov) without exception.

INDEPENDENT ACCOUNTANT'S REPORT ON APPLYING AGREED-UPON PROCEDURES

CLA observed that each expense is supported by:

- > An original itemized receipt that identifies precisely what was purchased.
- Documentation of the business/public purpose and for meal charges, that there was also documentation of the individuals participating.

CLA compared the entity's documentation of the business/public purpose to the requirements of Article 7, Section 14 of the Louisiana Constitution, which prohibits the loan, pledge, or donation of funds, credit, property, or things of value, and report any exceptions (e.g. hotel stays that extend beyond conference periods or payment for the travel expenses of a spouse) without exception.

CLA observed each expense and related documentation was reviewed and approved, in writing, by someone other than the person receiving reimbursement.

Contracts

15. CLA obtained a listing of all contracts in effect during the fiscal period or, alternately, obtain the general ledger and sort/filter for contract payments. CLA obtained management's representation that the listing or general ledger is complete.

Using the listing above, CLA randomly selected the five contract "vendors" (excluding the practitioner's contract) and:

- a) Observed that the contract was bid in accordance with the Louisiana Public Bid Law (e.g., solicited quotes or bids, advertised), if required by law.
- b) CLA obtained/reviewed contract documentation and board minutes and observed there was documentation of board approval, if required by policy or law (e.g. Lawrason Act or Home Rule Charter).
- c) If the contract was amended (e.g. change order), observed that the original contract terms provided for such an amendment.
- d) Randomly selected one payment from the fiscal period for each of the 5 contracts, obtained the supporting invoice, agreed the invoice to the contract terms, and observed that the invoice and related payment agreed to the terms and conditions of the contract.

Results: CLA obtained the general ledger and sorted/filtered for contract payments. CLA obtained management's representation that the general ledger is complete.

For the contracts selected (solicited quotes as a best practice was used and no contracts were amended), CLA observed if there is a formal/written board approved contract that supports the services arrangement, and that no contracts were subject to the Louisiana Public Bid Law or Procurement Code.

For the contracts selected obtained the supporting invoice, agreed the invoice to the contract terms, and observed that the invoice and related payment agreed to the terms and conditions of the contract.

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-6-

Payroll and Personnel

16. CLA obtained a listing of employees (and elected officials, if applicable) with their related salaries, and obtained management's representation that the listing was complete. CLA randomly selected five employees/officials, obtained their personnel files, and:

- a) CLA reviewed compensation paid to each employee during the fiscal period and observed payments were made in strict accordance with the terms and conditions of the employment contract or pay rate structure.
- b) CLA reviewed changes made to hourly pay rates/salaries during the fiscal period and observed those changes were approved in writing and in accordance with written policy.

Results: CLA obtained a list of employees (and elected officials, if applicable) with their related salaries, and obtained management's representation that the listing was complete. CLA randomly selected five employees/officials, obtained their personnel files, and noted that compensation paid to each employee during the fiscal period were made in strict accordance with the terms and conditions of the employment contract or pay rate structure. CLA noted that no changes were made to hourly pay rates/salaries during the fiscal period.

- 17. CLA obtained attendance and leave records and randomly selected one pay period in which leave has been taken by at least one employee. Within that pay period, CLA randomly selected one-third of employees/officials and:
 - Observed all selected employees/officials documented their daily attendance and leave (e.g., vacation, sick, compensatory).
 - b) Report whether there is written documentation that supervisors approved, electronically or in writing, the attendance and leave of the selected employees/officials.
- c) Report whether there is written documentation that the entity maintained written leave records (e.g., hours earned, hours used, and balance available) on those selected employees/officials that earn leave.

Results: CLA obtained attendance and leave records and noted that there were no employees that went on leave during the year.

18. CLA obtained from management a list of those employees/officials that terminated during the fiscal period and management's representation that the list is complete. CLA randomly selected two employees/officials, obtained related documentation of the hours and pay rates used in management's termination payment calculations, agreed the hours to the employee/officials' cumulate leave records, and agree the pay rates to the employee/officials' personnel files.

Results: CLA obtained a list of those employees/officials that terminated during the fiscal period and management's representation that the list is complete. CLA observed that were no employees terminated during the fiscal period. Employees or almost all teachers on annual contracts.

19. CLA obtained supporting documentation (e.g. cancelled checks, EFT documentation) relating to payroll taxes and retirement contributions during the fiscal period. CLA observed that the employee and employer portions of payroll taxes and retirement contributions, as well as the required reporting forms, were submitted to the applicable agencies by the required deadlines.

INDEPENDENT ACCOUNTANT'S REPORT ON APPLYING AGREED-UPON PROCEDURES

Results: CLA obtained supporting documentation (e.g. cancelled checks, EFT documentation) relating to payroll taxes and retirement contributions during the fiscal period and observed that the employee and employer portions of payroll taxes and retirement contributions, as well as the required reporting forms, were submitted to the applicable agencies by the required deadlines.

Ethics

We did not perform procedure 20 as this is not applicable to the not-for-profit charter school.

Other

 CLA inquired of management and determined the entity had no any misappropriations of public funds or assets.

Results: CLA inquired of management and determined the entity had no any misappropriations of public funds or assets.

 CLA observed that the entity has posted on its premises and website, the notice required by R.S. 24:523.1.

Results: CLA inquired of management and determined the entity had no any misappropriations of public funds or assets.

This agreed-upon procedures engagement was performed in accordance with attestation standards established by the American Institute of Certified Public Accountants and applicable standards of Government Auditing Standards. CLA was not engaged to and did not conduct an examination or review, the objective of which would be the expression of an opinion or conclusion, respectively, on management's assertions. Accordingly, we do not express such an opinion. Had we performed additional procedures, other matters might have come to our attention that would have been reported to you.

The report is intended solely for the use of management of the School, the Louisiana Department of Education, the Louisiana Legislature, and the Legislative Auditor, State of Louisiana, and should not be used by those who have not agreed to the procedures and taken responsibility for the sufficiency of the procedures for their purposes. Under Louisiana Revised Statute 24:513, this report is distributed by the Legislative Auditor as a public document.

Clifton Larson Allen LLP

CliftonLarsonAllen LLP Glendora CA September 12, 2017

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Payroll and Personnel

- 16. CLA obtained a listing of employees (and elected officials, if applicable) with their related salaries, and obtained management's representation that the listing was complete. CLA randomly selected five employees/officials, obtained their personnel files, and:
 - a) CLA reviewed compensation paid to each employee during the fiscal period and observed payments were made in strict accordance with the terms and conditions of the employment contract or pay rate structure.
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Results: CLA obtained a list of those employees/officials that terminated during the fiscal period and management's representation that the list is complete. CLA observed that were no employees terminated during the fiscal period. Employees or almost all teachers on annual contracts.

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INDEPENDENT ACCOUNTANT'S REPORT ON APPLYING AGREED-UPON PROCEDURES

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Ethics

We did not perform procedure 20 as this is not applicable to the not-for-profit charter school.

Other

Results: CLA inquired of management and determined the entity had no any misappropriations of public funds or assets.

 CLA observed that the entity has posted on its premises and website, the notice required by R.S. 24:523.1.

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This agreed-upon procedures engagement was performed in accordance with attestation standards established by the American Institute of Certified Public Accountants and applicable standards of Government Auditing Standards. CLA was not engaged to and did not conduct an examination or review, the objective of which would be the expression of an opinion or conclusion, respectively, on management's assertions. Accordingly, we do not express such an opinion. Had we performed additional procedures, other matters might have come to our attention that would have been reported to you.

The report is intended solely for the use of management of the School, the Louisiana Department of Education, the Louisiana Legislature, and the Legislative Auditor, State of Louisiana, and should not be used by those who have not agreed to the procedures and taken responsibility for the sufficiency of the procedures for their purposes. Under Louisiana Revised Statute 24:513, this report is distributed by the Legislative Auditor as a public document.

Clifton Larson Allen LLP

CliftonLarsonAllen LLP Glendora CA September 12, 2017

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ROOTED SCHOOL

FINANCIAL STATEMENTS AND SUPPLEMENTARY INFORMATION

YEAR ENDED JUNE 30, 2019



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WEALTH ADVISORY OUTSOURCING AUDIT, TAX, AND CONSULTING



INDEPENDENT AUDITORS' REPORT

Board of Directors Rooted School New Orleans, Louisiana

Report on the Financial Statements

We have audited the accompanying financial statements of Rooted School (the School), a nonprofit public benefit corporation, which comprise the statement of financial position as of June 30, 2019, and the related statements of activities, cash flows, and functional expenses for the year then ended, and the related notes to the financial statements.

Management's Responsibility for the Financial Statements

Management is responsible for the preparation and fair presentation of these financial statements in accordance with accounting principles generally accepted in the United States of America; this includes the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error.

Auditors' Responsibility

Our responsibility is to express an opinion on these financial statements based on our audit. We conducted our audit in accordance with auditing standards generally accepted in the United States of America and the standards applicable to financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States. Those standards require that we plan and perform the audit to obtain reasonable assurance about whether the financial statements are free of material misstatement.

An audit involves performing procedures to obtain audit evidence about the amounts and disclosures in the financial statements. The procedures selected depend on the auditors' judgment, including the assessment of the risks of material misstatement of the financial statements, whether due to fraud or error. In making those risk assessments, the auditor considers internal control relevant to the entity's preparation and fair presentation of the financial statements in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the entity's internal control. Accordingly, we express no such opinion. An audit also includes evaluating the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluating the overall presentation of the financial statements.

We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.



(1)

Board of Directors Rooted School

Opinion

In our opinion, the financial statements referred to on page one present fairly, in all material respects, the financial position of the School as of June 30, 2019, and the changes in its net assets and its cash flows for the year then ended in accordance with accounting principles generally accepted in the United States of America.

Other Matters

Other Information

Our audit was conducted for the purpose of forming an opinion on the School's financial statements as a whole. The accompanying schedule of compensation, benefits, and other payments to the agency head is presented for purposes of additional analysis and are not a required part of the basic financial statements. Such information is the responsibility of management and was derived from and relates directly to the underlying accounting and other records used to prepare the financial statements. The information has been subjected to the auditing procedures applied in the audit of the financial statements and certain additional procedures, including comparing and reconciling such information directly to the underlying accounting and other records used to prepare the financial statements or to the financial statements themselves, and other additional procedures in accordance with auditing standards generally accepted in the United States of America. In our opinion, the information is fairly stated, in all material respects, in relation to the financial statements as a whole.

The schedules required by Louisiana State Law, included as Schedules 1 through 2, are not a required part of the basic financial statements, but are supplementary information required by Louisiana State Law. Such information is the responsibility of management and was derived from and relates directly to the underlying accounting and other records used to prepare the combining financial statements. We have applied certain limited procedures, which are described in the Independent Accountants' Report on Applying Agreed-Upon Procedures. However, we did not audit this information and, accordingly, express no opinion on it.

Other Reporting Required by Government Auditing Standards

In accordance with Government Auditing Standards, we have also issued a report dated September 27, 2019 on our consideration of the School's internal control over financial reporting and on our tests of its compliance with certain provisions of laws, regulations, contracts, and grant agreements and other matters. The purpose of that report is to describe the scope of our testing of internal control over financial reporting and compliance and the results of that testing, and not to provide an opinion on the internal control over financial reporting or on compliance. That report is an integral part of an audit performed in accordance with Government Auditing Standards in considering the School's internal control over financial reporting and compliance.

Clifton Larson Allen LLP

CliftonLarsonAllen LLP

Glendora, California September 27, 2019

(2)

ROOTED SCHOOL STATEMENT OF FINANCIAL POSITION JUNE 30, 2019

ASSETS

CURRENT ASSETS		
Cash and Cash Equivalents	S	176,764
Accounts Receivable - Federal and State		64,356
Accounts Receivable - Other		7,863
Total Current Assets		248,983
Total Assets	S	248,983
LIABILITIES AND NET ASSETS		
CURRENT LIABILITIES		
Accounts Payable and Accrued Liabilities	S	105,422
Total Current Liabilities		105,422
NET ASSETS		
Without Donor Restriction	s	143,561
Total Net Assets		143,561
Total Liabilities and Net Assets	S	248,983

ROOTED SCHOOL STATEMENT OF ACTIVITIES YEAR ENDED JUNE 30, 2019

REVENUES, WITHOUT DONOR RESTRICTION		
State and Local Public School Funding	s	1,052,898
Other State Revenue		100,364
Federal Grants		99,318
Donations		626,642
Other Income		121,177
Total Revenues		2,000,399
EXPENSES		
Program Services		1,587,577
Management and General		278,443
Fundraising		191,141
Total Expenses		2,057,161
CHANGE IN NET ASSETS		(56,762)
Net Assets Without Donor Restriction - Beginning of Year	_	200,323
NET ASSETS WITHOUT DONOR RESTRICTION - END OF YEAR	S	143,561

(3)

See accompanying Notes to Financial Statements.

(4)

ROOTED SCHOOL STATEMENT OF CASH FLOWS YEAR ENDED JUNE 30, 2019

CASH FLOWS FROM OPERATING ACTIVITIES Change in Net Assets	s	(56,762)
Adjustments to Reconcile Change in Net Assets to Net		(00,702)
Cash Flows Provided by Operating Activities:		
Change in Operating Assets:		
Accounts Receivable		(11,535)
Change in Operating Liabilities:		
Accounts Payable and Accrued Liabilities		80,142
Net Cash Flows Provided by Operating Activities		11,845
NET CHANGE IN CASH AND CASH EQUIVALENTS		11,845
Cash and Cash Equivalents - Beginning of Year	2	164,919
CASH AND CASH EQUIVALENTS - END OF YEAR	S	176,764

ROOTED SCHOOL STATEMENT OF FUNCTIONAL EXPENSES YEAR ENDED JUNE 30, 2019

		Program Services		Management and General		Fundraising		Total Expenses	
Salaries and Wages	s	659,433	\$	78,069	\$	172,500	s	910,002	
Pension Expense		22,636		2,540		5,333		30,509	
Other Employee Benefits		73,569		11,743		6,848		92,160	
Payroll Taxes		48,930		16,022		2,460		67,412	
Legal Expenses		-		7.657				7,657	
Instructional Materials		119,235				-		119,235	
Other Fees for Services		388,742		30,546		4,000		423,288	
Advertising and Promotion Expenses		-		108		10 a		108	
Office Expenses				10,517				10,517	
Occupancy Expenses		211,689						211,689	
Insurance Expense				14,370				14,370	
Other Expenses		18,123		76,131		-		94,254	
Total	s	1,587,577	\$	278,443	\$	191,141	\$	2,057,161	

See accompanying Notes to Financial Statements.

(5)

See accompanying Notes to Financial Statements.

(6)

NOTE 1 SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES

Nature of Activities

The Rooted School (the School) was created as a nonprofit corporation under the laws of the State of Louisiana in 2014. The School applied to the Orleans Parish School Board to operate a Type I charter school. The Orleans Parish School Board approved the charter of the School for a period of five years commencing on July 1, 2017 and ending on June 30, 2022. The school serves eligible students in ninth through twelfth grade.

The School received approximately 63% of its total revenues from federal and state grantors.

Basis of Accounting

The financial statements have been prepared on the accrual method of accounting and accordingly reflect all significant receivables and liabilities.

Basis of Presentation

The accompanying financial statements have been prepared in conformity with accounting principles generally accepted in the United States of America as prescribed by the Financial Accounting Standards Board.

Use of Estimates

The preparation of financial statements in conformity with accounting principles generally accepted in the United States of America requires management to make estimates and assumptions that affect the reported amounts of assets, liabilities, and disclosures. Accordingly, actual results could differ from those estimates.

Functional Allocation of Expenses

Costs of providing the School's programs and other activities have been presented in the statement of functional expenses. During the year, such costs are accumulated into separate groupings as either direct or indirect. Indirect or shared costs are allocated among program and support services by a method that best measures the relative degree of benefit.

Cash and Cash Equivalents

The School defines its cash and cash equivalents to include only cash on hand, demand deposits, and liquid investments with original maturities of three months or less.

ROOTED SCHOOL NOTES TO FINANCIAL STATEMENTS JUNE 30, 2019

NOTE 1 SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (CONTINUED)

Net Asset Classes

Net assets, revenues, gains, and losses are classified based on the existence or absence of donor or grantor imposed restrictions. Accordingly, net assets and changes therein are classified and reported as follows:

Net Assets Without Donor Restrictions – Net assets available for use in general operations and not subject to donor (or certain grantor) restrictions. The governing board has designated, from net assets without donor restrictions, net assets for an operating reserve and board-designated endowment.

Net Assets With Donor Restrictions – Net assets subject to donor- (or certain grantor-) imposed restrictions. Some donor-imposed restrictions are temporary in nature, such as those that will be met by the passage of time or other events specified by the donor. Other donor-imposed restrictions are perpetual in nature, where the donor stipulates that resources be maintained in perpetuity. Donor-imposed restrictions are released when a restriction expires, that is, when the stipulated time has elapsed, when the stipulated purpose for which the resource was restricted has been fulfilled, or both.

Accounts Receivable

Accounts receivable primarily represent amounts due from federal and state governments as of June 30, 2019. Management believes that all receivables are fully collectible, therefore no provisions for uncollectible accounts were recorded.

Compensated Absences

The School does not allow employees to carryover unused vacation. Accordingly, there were no accumulated compensated absence benefits at June 30, 2019.

Revenue

The School's primary sources of funding are through the State Public School Fund and federal grants, as well as private donations. Federal grants are recorded on a cost reimbursement basis. An accrual is made when eligible expenses are incurred.

Contributions

All contributions are considered to be available for use unless specifically restricted by the donor. Amounts received that are restricted to specific use or future periods are reported as contributions with donor restrictions. Restricted contributions that are received and released in the same period are reported as promises to give without donor restrictions. Unconditional promises to give expected to be received in one year or less are recorded at. Unconditional value. Unconditional promises to give expected to be received in more than one year are recorded at fair value at the date of the promise. Conditional promises to give are not recognized until they become unconditional, that is, when the conditions on which they depend are substantially met.

(7)

(B)

NOTE 1 SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (CONTINUED)

Income Taxes

The School is a nonprofit entity exempt from the payment of income taxes under Internal Revenue Code Section 501(c)(3). Accordingly, no provision has been made for income taxes. Management has determined that all income tax positions are more likely than not of being sustained upon potential audit or examination; therefore, no disclosures of uncertain income tax positions are required. The School is subject to income tax on net income that is derived from business activities that are unrelated to the exempt purposes. The School files and exempt School return and applicable unrelated business income tax return in the U.S. federal jurisdiction.

Change in Accounting Principle

On August 18, 2016, FASB issued Accounting Standards Update (ASU) 2016-14, Not-for-Profit Entities (Topic 958) – Presentation of Financial Statements of Not-for-Profit Entities, The update addresses the complexity and understandability of net asset classification, deficiencies in information about liquidity and availability of resources, and the lack of consistency in the type of information provided about expenses and investment return. The School has implemented ASU 2016-14 and have adjusted the presentation in these financial statements accordingly.

Evaluation of Subsequent Events

The School has evaluated subsequent events through September 27, 2019, the date these financial statements were available to be issued.

NOTE 2 LIQUIDITY AND AVAILABILITY

Financial assets available for general expenditure are those without donor or other restrictions limiting their use within one year of the statement of financial position date. Financial assets available for general expenditures comprise cash and cash equivalents and grants receivable for the total amount of \$248,983.

NOTE 3 CONCENTRATION OF CREDIT RISK

The School maintains cash balances held in banks and revolving funds which are insured up to \$250,000 by the Federal Depository Insurance Corporation (FDIC). At times, cash in these accounts exceeds the insured amounts. The School has not experienced any losses in such accounts and believes it is not exposed to any significant credit risk on its cash and cash equivalents.

ROOTED SCHOOL NOTES TO FINANCIAL STATEMENTS JUNE 30, 2019

NOTE 4 EMPLOYEE RETIREMENT

Defined Contribution Plan

The School offers an Internal Revenue Code Section 401(k) retirement plan to each of its qualifying employees. Employer and employee contributions are used to purchase annuity contracts for each participant employee. Employer matching contributions are made as a percentage of elective deferrals for each employee who is eligible for employer contributions. Additionally, the employer may elect to make a discretionary contribution for each qualifying employee for each plan year. The amount of employer contributions used to purchase annuity contracts for the year ended June 30, 2019 was \$30,509.

NOTE 5 CONTINGENCIES

The School has received state and federal funds for specific purposes that are subject to review and audit by the grantor agencies. Although such audits could generate disallowances under terms of the grants, it is believed that any required reimbursement would not be material.

NOTE 6 FUNCTIONALIZED EXPENSES

The financial statements report certain categories of expenses that are attributed to more than one program or supporting function(s). Therefore, expenses require allocation on a reasonable basis that is consistently applied. The expenses that are allocated include salaries and wages, pension expense, other employee benefits, payroll taxes, other fees for services, office expenses, printing and postage, information technology, and other expenses, which are allocated on the basis of estimates of time and effort.

(9)

(10)



INDEPENDENT AUDITOR'S REPORT ON INTERNAL CONTROL OVER FINANCIAL REPORTING AND ON COMPLIANCE AND OTHER MATTERS BASED ON AN AUDIT OF FINANCIAL STATEMENTS PERFORMED IN ACCORDANCE WITH GOVERNMENT AUDITING STANDARDS

Board of Directors Rooted School New Orleans, Louisiana

We have audited, in accordance with the auditing standards generally accepted in the United States of America and the standards applicable to financial audits contained in *Government Auditing Standards* issued by the Comptroller General of the United States, the financial statements of Rooted School (the School), a nonprofit public benefit corporation, which comprise the statement of financial position as of June 30, 2019, and the related statements of activities, cash flows, and functional expenses for the year then ended, and the related notes to the financial statements, and have issued our report thereon dated September 27, 2019.

Internal Control Over Financial Reporting

In planning and performing our audit of the financial statements, we considered the School's internal control over financial reporting (internal control) to determine the audit procedures that are appropriate in the circumstances for the purpose of expressing our opinion on the financial statements, but not for the purpose of expressing an opinion on the effectiveness of the School's internal control. Accordingly, we do not express an opinion on the effectiveness of the School's internal control.

A deficiency in internal control exists when the design or operation of a control does not allow management or employees, in the normal course of performing their assigned functions, to prevent or detect and correct misstatements on a timely basis. A *material weakness* is a deficiency or a combination of deficiencies in internal control such that there is a reasonable possibility that a material misstatement of the financial statements will not be prevented or detected and corrected on a timely basis. A *significant deficiency* is a deficiency, or a combination of deficiencies, in internal control that is less severe than a material weakness, yet important enough to merit attention by those charged with governance.

Our consideration of internal control was for the limited purpose described in the first paragraph of this section and was not designed to identify all deficiencies in internal control that might be material weaknesses or significant deficiencies. Given these limitations, during our audit we did not identify any deficiencies in internal control that we consider to be material weaknesses. However, material weaknesses may exist that have not been identified.



(11)

Board of Directors Rooted School

Compliance and Other Matters

As part of obtaining reasonable assurance about whether the School's financial statements are free from material misstatement, we performed tests of its compliance with certain provisions of laws, regulations, contracts, and grant agreements, noncompliance with which could have a direct and material effect on the determination of financial statement amounts. However, providing an opinion on compliance with those provisions was not an objective of our audit, and accordingly, we do not express such an opinion. The results of our tests disclosed no instances of noncompliance or other matters that are required to be reported under *Government Auditing Standards*.

Purpose of this Report

The purpose of this report is solely to describe the scope of our testing of internal control and compliance and the results of that testing, and not to provide an opinion on the effectiveness of the entity's internal control or on compliance. This report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering the entity's internal control and compliance. Accordingly, this communication is not suitable for any other purpose.

Clifton larson Allen LLP

CliftonLarsonAllen LLP

Glendora, California September 27, 2019

(12)

ROOTED SCHOOL SCHEDULE OF FINDINGS YEAR ENDED JUNE 30, 2019 ROOTED SCHOOL SCHEDULE OF PRIOR YEAR FINDINGS YEAR ENDED JUNE 30, 2019

(14)

There were no findings for the year ended June 30, 2019.

There were no findings for the year ended June 30, 2018.

(13)

ROOTED SCHOOL SCHEDULE OF COMPENSATION, BENEFITS, AND OTHER PAYMENTS TO THE AGENCY HEAD YEAR ENDED JUNE 30, 2019

Purpose	Amount
Salary	\$ 100,000
Benefits - Employer Portion of Retirement	4,750
Benefits - Employer Portion of Medical/Dental/Vision	4,409
Travel	-
Cell Phone Reimbursement	-
Reimbursements	
Conferences	-
Benefits - FICA Medicare	11,191
Other Compensation-Security	
Community Relations	-
Professional Development	
Total	\$ 120,350

SCHEDULES REQUIRED BY LOUISIANA STATE LAW

(R.S. 24:514 - PERFORMANCE AND STATISTICAL DATA)

(15)



Board of Directors Rooted School New Orleans, Louisiana

We have performed the procedures enumerated below, which were agreed to by Rooted School (the School); the Louisiana Department of Education, and the Louisiana Legislative Auditor (the specified parties), on the performance and statistical data accompanying the annual financial statements of the School for the fiscal year ended June 30, 2019; and to determine whether the specified schedules are free of obvious errors and omissions as provided by the Board of Elementary and Secondary Education (BESE) Bulletin 126, in compliance with Louisiana Revised Statute 24:514 I. Management of the School is responsible for its performance and statistical data. The sufficiency of these procedures is solely the responsibility of the specified parties. Consequently, we make no representation regarding the sufficiency of the procedures enumerated below either for the purpose for which this report has been requested or for any other purpose.

Our procedures and findings relate to the accompanying schedules of supplemental information and are as follows:

General Fund Instructional and Support Expenditures and Certain Local Revenue Sources (Schedule 1)

- We selected a random sample of 25 transactions and reviewed supporting documentation to determine if the sampled expenditures/revenues are classified correctly, based on description and nature of the revenue/expense, and are reported in the proper amounts for each of the following amounts reported on the schedule:
 - · Total General Fund Instructional Expenditures,
 - · Total General Fund Equipment Expenditures,
 - Total Local Taxation Revenue,
 - Total Local Earnings on Investment in Real Property.
 - · Total State Revenue in Lieu of Taxes,
 - Nonpublic Textbook Revenue, and
 - Nonpublic Transportation Revenue

Findings:

None.



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Board of Directors Rooted School

Class Size Characteristics (Schedule 2)

We obtained a list of classes by school, school type, and class size as reported on the schedule. We then traced all classes to the October 1st roll books for those classes and determined if the class was accurately classified on the schedule.

Findings:

None.

Education Levels of Public School Staff (NO SCHEDULE)

3. We obtained October 1st PEP data submitted to the Department of Education (or equivalent listing prepared by management), including full-time teachers, principals, and assistant principals by classification, as well as their level of education and experience, and obtained management's representation that the data/listing was complete. We then selected a sample of 25 individuals, traced to each individual's personnel file, and observed that each individual's education level and experience was property classified on the PEP data or equivalent listing prepared by management.

Findings: None.

None.

This agreed-upon procedures engagement was performed in accordance with attestation standards established by the American Institute of Certified Public Accountants, and the standards applicable to attestation engagements contained in *Government Auditing Standards*, issued by the United States Comptroller General. We were not engaged to and did not conduct an examination or review, the objective of which would be the expression of an opinion or conclusion, respectively, on the performance and statistical data. Accordingly, we do not express such an opinion or conclusion. Had we performed additional procedures, other matters might have come to our attention that would have been reported to you.

The purpose of this report is solely to describe the scope of testing performed on the performance and statistical data accompanying the annual financial statements of the (City or Parish School Board or Charter School), as required by Louisiana Revised Statue 24:514.1, and the result of that testing, and not to provide an opinion on control or compliance. Accordingly, this report is not suitable for any other purpose. Under Louisiana Revised Statue 24:513, this report is distributed by the Louisiana Legislative Auditor as a public document.

Clifton Larson Allen LLP

CliftonLarsonAllen LLP

Glendora, California September 27, 2019

(16)

ROOTED SCHOOL GENERAL FUND INSTRUCTIONAL AND SUPPORT EXPENDITURES AND CERTAIN LOCAL REVENUE SOURCES SCHEDULE 1 YEAR ENDED JUNE 30, 2019 (SEE INDEPENDENT ACCOUNTANTS' REPORT ON AGREED-UPON PROCEDURES.)

General Fund Instructional and Equipment Expenditures	Column A	c	olumn B
General Fund Instructional Expenditures:			
Teacher and Student Interaction Activities:			
Classroom Teacher Salaries	322,566		
Other Instructional Staff Activities	10,021		
Instructional Staff Employee Benefits	65,759		
Purchased Professional and Technical Services	82,891		
Instructional Materials and Supplies	105,178		
Instructional Equipment	4,059		
Total Teacher and Student Interaction Activities	5 E.V.	\$	590,474
Other Instructional Activities			
Pupil Support Services	235,062		
Less: Equipment for Pupil Support Services			
Net Pupil Support Services			235,063
Instructional Staff Services	175,448		
Less: Equipment for Instructional Staff Services			
Net Instructional Staff Services	3		175,44
School Administration	370,253		
Less: Equipment for School Administration			
Net School Administration	10		370,25
Total General Fund Instructional Expenditures			
(Total of Column B)		\$	1,371,23
Total General Fund Equipment Expenditures			
(Object 730; Functional Series 1000-4000)		\$	4,05
ocal Revenue Sources			
arnings on investments:			
Interest on Investments		\$	
ther Revenue from Local Sources:			
Contributions and Donations			626,64;
Revenue from Judgements/Court Orders			
fiscellaneous Revenues:			
Other Miscellaneous Revenues			121,17
Total Revenues from Local Sources		\$	747,819

ROOTED SCHOOL CLASS-SIZE CHARACTERISTICS SCHEDULE 2 YEAR ENDED JUNE 30, 2019 (SEE INDEPENDENT ACCOUNTANTS' REPORT ON AGREED-UPON PROCEDURES.)

	Class Size Range									
School Type	1-20		21-26		27-33		34+			
	Number	Percent	Number	Percent	Number	Percent	Number	Percent		
Elementary			S							
Elementary Activity Class			S			8 S		2		
Middle High			2 C							
Middle High Activity Class			3 3	2 2		2		2		
High	2	50%	2	50%						
High Activity Class		100000	3 × 9	1 - 10 - 10						
Combination										
Combination Activity Class			8 8	0						

(18)

(17)



Board of Directors Rooted School New Orleans, LA

We have performed the procedures enumerated below, which were agreed to by Rooted School (the School) and the Louisiana Legislative Auditor (LLA), on the control and compliance (C/C) areas identified in the LLA's Statewide Agreed-Upon Procedures (SAUPs) for the fiscal period July 1, 2018 through June 30, 2019. The Entity's management is responsible for those C/C areas identified in the SAUPs. The sufficiency of these procedures is solely the responsibility of the specified users of this report. Consequently, we make no representation regarding the sufficiency of the procedures described below either for the purpose for which this report has been requested or for any other purpose.

This agreed-upon procedures engagement was conducted in accordance with attestation standards established by the American institute of Certified Public Accountants and applicable standards of *Government Auditing Standards*. The sufficiency of these procedures is solely the responsibility of the specified users of this report. Consequently, we make no representation regarding the sufficiency of the procedures described below either for the purpose for which this report has been requested or for any other purpose.

Rotation of Procedures

Entities that did not have exceptions in one or more of the twelve SAUP categories tested during Year 2 may exclude those categories from testing in Year 3.

Our procedures and findings are as follows:

Written Policies and Procedures

The prior year Statewide Agreed-Upon procedures had no exceptions in this area.

k. Disaster Recovery/Business Continuity, including (1) identification of critical data and frequency of data backups, (2) storage of backups in a separate physical location isolated from the network, (3) periodic testing/verification that backups can be restored, (4) use of antivirus software on all systems, (5) timely application of all available system and software patches/updates, and (6) identification of personnel, processes, and tools needed to recover operations after a critical event.

Results: The written policies and procedures addressed the above financial/business function.

Board or Finance Committee

We did not perform procedures for the period ended June 30, 2019. The prior year Statewide Agreed-Upon procedures had no exceptions in this area.

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Bank Reconciliations

We did not perform procedures for the period ended June 30, 2019. The prior year Statewide Agreed-Upon procedures had no exceptions in this area.

Collections

We did not perform procedures for the period ended June 30, 2019. The prior year Statewide Agreed-Upon procedures had no exceptions in this area.

Non-Payroll Disbursements (excluding card purchases/payments, travel reimbursements, and petty cash purchases)

We did not perform procedures for the period ended June 30, 2019. The prior year Statewide Agreed-Upon procedures had no exceptions in this area.

Credit Cards/Debit Cards/Fuel Cards/P-Cards

We did not perform procedures for the period ended June 30, 2019. The prior year Statewide Agreed-Upon procedures had no exceptions in this area.

Travel and Travel-Related Expense Reimbursements (excluding card transactions)

We did not perform procedures for the period ended June 30, 2019. The prior year Statewide Agreed-Upon procedures had no exceptions in this area.

Contracts

We did not perform procedures for the period ended June 30, 2019. The prior year Statewide Agreed-Upon procedures had no exceptions in this area.

Payroll and Personnel

We did not perform procedures for the period ended June 30, 2019. The prior year Statewide Agreed-Upon procedures had no exceptions in this area.

Ethics

We did not perform procedures for the period ended June 30, 2019. It is not applicable to this not-for-profit charter school.

Other

We did not perform procedures for the period ended June 30, 2019. The prior year Statewide Agreed-Upon procedures had no exceptions in this area.

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INDEPENDENT ACCOUNTANT'S REPORT ON APPLYING AGREED-UPON PROCEDURES

This agreed-upon procedures engagement was performed in accordance with attestation standards established by the American Institute of Certified Public Accountants and applicable standards of Government Auditing Standards. CLA was not engaged to and did not conduct an examination or review, the objective of which would be the expression of an opinion or conclusion, respectively, on management's assertions. Accordingly, we do not express such an opinion. Had we performed additional procedures, other matters might have come to our attention that would have been reported to you.

The report is intended solely for the use of management of the School, the Louisiana Department of Education, the Louisiana Legislature, and the Legislative Auditor, State of Louisiana, and should not be used by those who have not agreed to the procedures and taken responsibility for the sufficiency of the procedures for their purposes. Under Louisiana Revised Statute 24:513, this report is distributed by the Legislative Auditor as a public document.

Clifton Larson Allen LLP

CliftonLarsonAllen LLP Glendora, California September 27, 2019





Board of Directors Rooted School New Orleans, Louisiana

We have audited the financial statements of Rooted School as of and for the year ended June 30, 2019, and have issued our report thereon dated September 27, 2019. We have previously communicated to you information about our responsibilities under auditing standards generally accepted in the United States of America, *Government Auditing Standards*, as well as certain information related to the planned scope and timing of our audit. Professional standards also require that we communicate to you the following information related to our audit.

Significant audit findings

Qualitative aspects of accounting practices

Accounting policies

Management is responsible for the selection and use of appropriate accounting policies. The significant accounting policies used by Rooted School are described in Note 1 to the financial statements.

As described in the footnotes, the entity changed accounting policies related to financial reporting by adopting Accounting Standards Update (ASU) 2016-14, Not-For-Profit Entities (Topic 958): Presentation of Financial Statements of Not-for-Profit Entities, in 2018. Accordingly, the accounting change has been retrospectively applied to prior periods presented as if the policy had always been used.

We noted no transactions entered into by the entity during the year for which there is a lack of authoritative guidance or consensus. All significant transactions have been recognized in the financial statements in the proper period.

Accounting estimates

Accounting estimates are an integral part of the consolidated financial statements prepared by management and are based on management's knowledge and experience about past and current events and assumptions about future events. Certain accounting estimates are particularly sensitive because of their significance to the consolidated financial statements and because of the possibility that future events affecting them may differ significantly from those expected. There were no accounting estimates deemed significant to the consolidated financial statements.

Financial statement disclosures

The financial statement disclosures are neutral, consistent, and clear.

Difficulties encountered in performing the audit

We encountered no significant difficulties in dealing with management in performing and completing our audit.



Board of Directors Rooted School Page 2

Uncorrected misstatements

Professional standards require us to accumulate all misstatements identified during the audit, other than those that are clearly trivial, and communicate them to the appropriate level of management. Management did not identify and we did not notify them of any uncorrected financial statement misstatements.

Corrected misstatements

Management did not identify and we did not notify them of any financial statement misstatements detected as a result of audit procedures.

Disagreements with management

For purposes of this letter, a disagreement with management is a financial accounting, reporting, or audiling matter, whether or not resolved to our satisfaction, that could be significant to the financial statements or the auditors' report. No such disagreements arose during our audit.

Management representations

We have requested certain representations from management that are included in the management representation letter dated September 27, 2019.

Management consultations with other independent accountants

In some cases, management may decide to consult with other accountants about auditing and accounting matters, similar to obtaining a "second opinion" on certain situations. If a consultation involves application of an accounting principle to the entity's financial statements or a determination of the type of auditors' opinion that may be expressed on those statements, our professional standards require the consulting accountant to check with us to determine that the consultant has all the relevant facts. To our knowledge, there were no such consultations with other accountants.

Significant issues discussed with management prior to engagement

We generally discuss a variety of matters, including the application of accounting principles and auditing standards, with management each year prior to engagement as the entity's auditors. However, these discussions occurred in the normal course of our professional relationship and our responses were not a condition to our engagement.

Other information in documents containing audited financial statements

With respect to the supplementary information accompanying the financial statements, on which we were engaged to report in relation to the financial statements as a whole, we made certain inquiries of management and evaluated the form, content, and methods of preparing the information to determine that the information complies with accounting principles generally accepted in the United States of America, the method of preparing it has not changed from the prior period or the reasons for such changes, and the information is appropriate and complete in relation to our audit of the financial statements. We compared and reconciled the supplementary information to the underlying accounting records used to prepare the financial statements or to the financial statements themselves. We have issued our report thereon dated September 27, 2019.

Board of Directors Rooted School Page 3

Other audit issues and upcoming new standards

Revenue from Contracts with Customers

In May 2014, the Financial Accounting Standards Board (FASB) issued Accounting Standards Update (ASU) No. 2014-09, Revenue from Contracts with Customers (Topic 606). This new revenue recognition standard affects all entities, including public, private, and not-for-profit, that have contracts with customers, except where there is other specific revenue recognition guidance issued by the FASB.

This new revenue recognition standard effectively eliminates the transaction specific and industryspecific revenue recognition guidance under current accounting principles generally accepted in the United States of America (U.S. GAAP) and replaces it with a principles-based approach for determining an entity's revenue recognition policies. The core principle of the revenue recognition standard is that an entity should recognize revenue to depict the transfer of goods or services to customers in an amount that reflects the consideration to which the entity expects to be entitled in exchange for those goods or services.

The effective date for this new revenue recognition standard for nonpublic entities is for annual reporting periods beginning after December 15, 2018.

This ASU has the potential to cause major changes in revenue recognition and have significant effects on an entity's financial statements. Based on the effective date and the adoption methods provided for in the standard, we strongly encourage management and governance of the entity to gain an understanding of the effect of Topic 606 by performing an assessment of the entity's various revenue streams, which may require a detailed review of customer contracts. The entity should be prepared to update policies and procedures. The assessment should be performed before making quantitative conclusions regarding the financial statement effect of Topic 606. We are available to assist you in developing your adoption and implementation plan over the course of the next few months.

This communication is intended solely for the information and use of the board of directors and management of Rooted School and is not intended to be, and should not be, used by anyone other than these specified parties.

* * *

Clifton Larson Allen LLP

CliftonLarsonAllen LLP

Glendora, California September 27, 2019

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ROOTED SCHOOL

FINANCIAL STATEMENTS AND SUPPLEMENTARY INFORMATION

YEAR ENDED JUNE 30, 2020



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INDEPENDENT AUDITORS' REPORT

Board of Directors Rooted School New Orleans, Louisiana

Report on the Financial Statements

We have audited the accompanying financial statements of Rooted School (the School), a nonprofit public benefit corporation, which comprise the statement of financial position as of June 30, 2020, and the related statements of activities, cash flows, and functional expenses for the year then ended, and the related notes to the financial statements.

Management's Responsibility for the Financial Statements

Management is responsible for the preparation and fair presentation of these financial statements in accordance with accounting principles generally accepted in the United States of America; this includes the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error.

Auditors' Responsibility

Our responsibility is to express an opinion on these financial statements based on our audit. We conducted our audit in accordance with auditing standards generally accepted in the United States of America and the standards applicable to financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States. Those standards require that we plan and perform the audit to obtain reasonable assurance about whether the financial statements are free of material misstatement.

An audit involves performing procedures to obtain audit evidence about the amounts and disclosures in the financial statements. The procedures selected depend on the auditors' judgment, including the assessment of the risks of material misstatement of the financial statements, whether due to fraud or error. In making those risk assessments, the auditor considers internal control relevant to the entity's preparation and fair presentation of the financial statements in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the entity's internal control. Accordingly, we express no such opinion. An audit also includes evaluating the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluating the overall presentation of the financial statements.

We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.



(1)

Board of Directors Rooted School

Opinion

In our opinion, the financial statements referred to on page one present fairly, in all material respects, the financial position of the School as of June 30, 2020, and the changes in its net assets and its cash flows for the year then ended in accordance with accounting principles generally accepted in the United States of America.

Other Matters

Supplementary Information

Our audit was conducted for the purpose of forming an opinion on the School's financial statements as a whole. The Expansion and Rooted School columns in the statements of financial position, activities, functional expenses, and cash flows as well as the accompanying schedule of compensation, benefits, and other payments to the agency head is presented for purposes of additional analysis and are not a required part of the basic financial statements. Such information is the responsibility of management and was derived from and relates directly to the underlying accounting and other records used to prepare the financial statements. The information has been subjected to the auditing procedures applied in the audit of the financial statements and certain additional procedures, including comparing and reconciling such information directly to the underlying accounting and other records used to prepare the financial statements or to the financial statements themselves, and other additional procedures in accordance with auditing standards generally accepted in the United States of America. In our opinion, the information is fairly stated, in all material respects, in relation to the financial statements as a whole.

The schedules required by Louisiana State Law, included as Schedules 1 through 2, are not a required part of the basic financial statements, but are supplementary information required by Louisiana State Law. Such information is the responsibility of management and was derived from and relates directly to the underlying accounting and other records used to prepare the combining financial statements. We have applied certain limited procedures, which are described in the Independent Accountants' Report on Applying Agreed-Upon Procedures. However, we did not audit this information and, accordingly, express no opinion on it.

Other Reporting Required by Government Auditing Standards

In accordance with Government Auditing Standards, we have also issued a report dated December 11, 2020 on our consideration of the School's internal control over financial reporting and on our tests of its compliance with certain provisions of laws, regulations, contracts, and grant agreements and other matters. The purpose of that report is to describe the scope of our testing of the internal control over financial reporting and compliance and the results of that testing, and not to provide an opinion on the effectiveness of the School's internal control over financial reporting or on compliance. That report is an integral part of an audit performed in accordance with Government Auditing Standards in considering the School's internal control over financial reporting and compliance.

Clifton Larson Allen LLP

CliftonLarsonAllen LLP

Glendora, California December 11, 2020

(2)

ROOTED SCHOOL STATEMENT OF FINANCIAL POSITION JUNE 30, 2020

	E	xpansion	Roc	ted School		Total
ASSETS						
CURRENT ASSETS						
Cash and Cash Equivalents	s	264,149	\$	212,125	\$	476,274
Accounts Receivable		125,000		322,414		447,414
Prepaid Expenses and Other Assets				14,034		14,034
Total Current Assets		389,149	<u></u>	548,573		937,722
Total Assets	s	389,149	\$	548,573	s	937,722
LIABILITIES AND NET ASSETS						
CURRENT LIABILITIES						
Accounts Payable and Accrued Liabilities	s	-	\$	91,981	s	91,981
Deferred Revenue				75,000		75,000
Total Current Liabilities			_	166,981		166,981
LONG-TERM LIABILITIES						
Loans Payable		12		345,495		345,495
Total Long-Term Liabilities		-	-	345,495		345,495
NET ASSETS						
Without Donor Restriction		247,436		(88,903)		158,533
With Donor Restriction		141,713		125,000		266,713
Total Net Assets	=	389,149	_	36,097	_	425,246
Total Liabilities and Net Assets	s	389,149	\$	548,573	\$	937,722

ROOTED SCHOOL STATEMENT OF ACTIVITIES YEAR ENDED JUNE 30, 2020

	Expansion		Ros	oted School	Total		
REVENUES, WITHOUT DONOR RESTRICTION							
State and Local Public School Funding	s	-	\$	1.893.065	\$	1,893,065	
Other State Revenue		- 23		36,150		36,150	
Federal Grants		- 1		248,395		248,395	
Donations	43	2,000		139,234		571,234	
Other Income		1.		11,462		11,462	
Releases from Donor Restriction	20	0,287				20,287	
Total Revenues	45	2,287		2,328,306		2,780,593	
EXPENSES							
Program Services	25	9,378		1,933,932		1,963,310	
Management and General	24	1,148		501,838		742,986	
Fundraising	50	9,325		-		59,325	
Total Expenses	32	9,851	_	2,435,770	_	2,765,621	
CHANGE IN NET ASSETS WITHOUT DONOR RESTRICTION	12:	2,436		(107,464)		14,972	
REVENUES, WITH DONOR RESTRICTION							
Donations	16	2,000		125,000		287,000	
Releases from Donor Restriction	(20	0,287)				(20,287)	
Total Revenues With Donor Restriction	14	1,713	_	125,000	_	266,713	
CHANGE IN NET ASSETS WITH DONOR RESTRICTION	14	1,713	_	125,000	_	266,713	
TOTAL CHANGE IN NET ASSETS	26	4,149		17,536		281,685	
Net Assets - Beginning of Year	12	5,000	_	18,561	_	143,561	
NET ASSETS - END OF YEAR	\$ 38	9,149	\$	36,097	\$	425,246	

See accompanying Notes to Financial Statements.

(3)

See accompanying Notes to Financial Statements.

(4)

ROOTED SCHOOL STATEMENT OF CASH FLOWS YEAR ENDED JUNE 30, 2020

CASH FLOWS FROM OPERATING ACTIVITIES Change in Net Assets	\$	281,685
Adjustments to Reconcile Change in Net Assets to Net	2	201,000
Cash Flows Used by Operating Activities:		
Change in Operating Assets:		
Accounts Receivable		(375, 195)
Prepaid Expenses and Other Assets		(14,034)
Change in Operating Liabilities:		
Accounts Payable and Accrued Liabilities		(13,441)
Deferred Revenue		75,000
Net Cash Flows Used by Operating Activities		(45,985)
CASH FLOWS FROM FINANCING ACTIVITIES		
Proceeds for Debt Issuance		345,495
Net Cash Flows Provided by Financing Activities	_	345,495
NET CHANGE IN CASH AND CASH EQUIVALENTS		299,510
Cash and Cash Equivalents - Beginning of Year		176,764
CASH AND CASH EQUIVALENTS - END OF YEAR	\$	476,274

See accompanying Notes to Financial Statements.

(5)

ROOTED SCHOOL STATEMENT OF FUNCTIONAL EXPENSES YEAR ENDED JUNE 30, 2020

	_	Program			tal			
			Management and General		Fundraising			Total Expenses
Salaries and Wages Pension Expense Other Employee Benefits Payroll Taxes Legal Expenses Accounting Expenses Interructional Materials Other Fees for Services Advertising and Promotion Expenses Occupancy Expenses Occupancy Expenses Tavel Expenses	3	937,775 29,547 103,533 69,445 	53	244,597 6,601 13,535 21,234 37,229 41,051 24,860 803 13,828 1,365 47,864	\$	54,745 1,060 2,253 1,267 - - - - - - - - - - - -	49	1,237,117 37,108 119,321 91,946 37,229 41,061 133,292 453,137 16,025 13,828 228,255 48,429
Insurance Expense Other Expenses		20.764		19,973 270,146		-		19,973 290,910
Total	\$	1,963,310	\$	742.986	\$	59,325	\$	2,765,621
	85		10	Expa	nsion			
		Program Services		nagement d General	Fundraising		Total Expenses	
Salaries and Wages Pension Expense Other Employee Benefits Payroll Taxes Legal Expenses Instructional Materials Other Fees for Servicas Advertising and Promotion Expenses Advertising and Promotion Expenses Occupancy Expenses Other Expenses Other Expenses	\$	24,000 720 2,334 1,921 - - - - -	\$	18,505 870 34,136 20,337 216 1,365 40,321 125,398	\$	54,745 1,060 2,253 1,267 - - - - - - - - - - - - - - - - - - -	\$	97,250 2,650 4,56 3,181 34,136 40 20,33 216 1,369 40,32 125,396
Total	\$	29,378	\$	241,148	\$	59,325	\$	329,85
	_	Program	Ma	Rooted nagement	School			Total
	_	Services		d General	Fur	ndraising		Expenses
Salaries and Wages Pension Expense Dither Employee Genefits Payroll Taxes e.gal Expenses Accounting Expenses Instructional Materials Other Fees for Services Advertising and Promotion Expenses Office Expenses Occupancy Expenses Torvel Expenses Insurance Expense Tother Expenses	\$	913,775 28,827 101,199 67,524 	\$	226,092 5,631 13,535 21,234 3,093 41,051 4,523 587 13,828 7,543 19,973 144,748	5		\$	1,139,86 34,45 114,73 88,75 132,88 41,05 132,88 432,80 15,80 13,82 224,89 8,100 19,97 165,51

See accompanying Notes to Financial Statements.

(6)

NOTE 1 SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES

Nature of Activities

The Rooted School (the School) was created as a nonprofit corporation under the laws of the state of Louisiana in 2014. The School applied to the Orleans Parish School Board to operate a Type I charter school. The Orleans Parish School Board approved the charter of the School for a period of five years commencing on July 1, 2017 and ending on June 30, 2022. The school serves eligible students in ninth through twelfth grade.

The School received approximately 63% of its total revenues from federal and state grantors.

Basis of Accounting

The financial statements have been prepared on the accrual method of accounting and accordingly reflect all significant receivables and liabilities.

Basis of Presentation

The accompanying financial statements have been prepared in conformity with accounting principles generally accepted in the United States of America as prescribed by the Financial Accounting Standards Board.

Use of Estimates

The preparation of financial statements in conformity with accounting principles generally accepted in the United States of America requires management to make estimates and assumptions that affect the reported amounts of assets, liabilities, and disclosures. Accordingly, actual results could differ from those estimates.

Functional Allocation of Expenses

Costs of providing the School's programs and other activities have been presented in the statement of functional expenses. During the year, such costs are accumulated into separate groupings as either direct or indirect. Indirect or shared costs are allocated among program and support services by a method that best measures the relative degree of benefit.

Cash and Cash Equivalents

The School defines its cash and cash equivalents to include only cash on hand, demand deposits, and liquid investments with original maturities of three months or less.

Accounts Receivable

Accounts receivable primarily represent amounts due from federal and state governments as of June 30, 2020. Management believes that all receivables are fully collectible; therefore, no provisions for uncollectible accounts were recorded.

Compensated Absences

The School does not allow employees to carryover unused vacation. Accordingly, there were no accumulated compensated absence benefits at June 30, 2020.

(7)

ROOTED SCHOOL NOTES TO FINANCIAL STATEMENTS JUNE 30, 2020

NOTE 1 SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (CONTINUED)

Net Asset Classes

Net assets, revenues, gains, and losses are classified based on the existence or absence of donor- or grantor-imposed restrictions. Accordingly, net assets and changes therein are classified and reported as follows:

Net Assets Without Donor Restrictions - Net assets available for use in general operations and not subject to donor (or certain grantor) restrictions.

Net Assets With Donor Restrictions – Net assets subject to donor- (or certain grantor-) imposed restrictions. Some donor-imposed restrictions are temporary in nature, such as those that will be met by the passage of time or other events specified by the donor. Other donor-imposed restrictions are perpetual in nature, where the donor stipulates that resources be maintained in perpetuity. Contributions restricted by donors as increases in net assets without donor restrictions if the restrictions expire (that is, when a stipulated time restriction ends or purpose restriction is accomplished) in the reporting period in which the revenue is recognized. All other donor-restricted contributions are reported as increases in net assets with donor restrictions. When a restriction expire, net assets with donor restrictions and recognized assets released from restrictions and reported in the statements of activities as net assets released from restrictions.

Revenue

The School's primary sources of funding are through the State Public School Fund and federal grants, as well as private donations. Federal grants are recorded on a cost reimbursement basis. An accrual is made when eligible expenses are incurred.

Revenue Recognition

Amounts received from the State Public School Fund are conditional and recognized as revenue by the School based on the enrollment of students. Revenue that is restricted is recorded as an increase in net assets without donor restriction, if the restriction expires in the reporting period in which the revenue is recognized. All other restricted revenues are reported as increases in net assets with donor restriction.

Contributions

All contributions are considered to be available for use unless specifically restricted by the donor. Amounts received that are restricted to specific use or future periods are reported as contributions with donor restrictions. Restricted contributions that are received and released in the same period are reported as promises to give without donor restrictions. Unconditional promises to give expected to be received in one year or less are recorded at that realizable value. Unconditional promises to give expected to be received in more than one year are recorded at fair value at the date of the promise. Conditional promises to give are not recognized until they become unconditional, that is, when the conditions on which they depend are substantially met.

(8)

NOTE 1 SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (CONTINUED)

Conditional Grants

Grants and contracts that are conditioned upon the performance of certain requirements or the incurrence of allowable qualifying expenses are recognized as revenues in the period in which the conditions are met. Amounts received are recognized as revenue when the School has incurred expenditures in compliance with specific contract or grant provisions. Amounts received prior to incurring qualifying expenditures are reported as deferred revenues in the statement of financial position. The School has received cost reimbursable grants and conditional contributions of \$75,000 that have not been recognized at June 30, 2020 because qualifying expenditures have not been incurred.

Income Taxes

The School is a nonprofit entity exempt from the payment of income taxes under Internal Revenue Code Section 501(c)(3). Accordingly, no provision has been made for income taxes. Management has determined that all income tax positions are more likely than not of being sustained upon potential audit or examination; therefore, no disclosures of uncertain income tax positions are required. The School is subject to income tax on net income that is derived from business activities that are unrelated to the exempt purposes. The School files an exempt School return and applicable unrelated business income tax return in the U.S. federal jurisdiction.

Change in Accounting Principle

In May 2014, FASB issued Accounting Standards Update (ASU) 2014-09, Revenues from Contracts with Customers (Topic 606). The update establishes the core principle that an entity should recognize revenue to depict the transfer of promised goods or services to customers in the amount that reflects the consideration to which the entity expects to be entitled in exchange for those good or services. The School has early adopted the implementation of ASU 2014-09 under the full retrospective approach. There was no material impact on the School's financial position and results of operations upon adoption of the new standard.

In June 2018, FASB issued Accounting Standards Update (ASU) 2018-08, Not-for-Profit Entities (Topic 958) – Clarifying the Scope and the Accounting Guidance for Contributions Received and Contributions Made. The update clarifies and improves the scope and the accounting guidance for contributions received and contributions made. The amendments in this update should assist entities in (1) evaluating whether transactions should be accounted for as contributions (nonreciprocal transactions), or as exchange (reciprocal transactions) and (2) determining whether a contribution is conditional. The School has implemented ASU 2018-08 under the full retrospective approach. There was no material impact on the School's financial position and results of operations upon adoption of the new standard.

Evaluation of Subsequent Events

The School has evaluated subsequent events through December 11, 2020, the date these financial statements were available to be issued.

ROOTED SCHOOL NOTES TO FINANCIAL STATEMENTS JUNE 30, 2020

NOTE 2 LIQUIDITY AND AVAILABILITY

Financial assets available for general expenditure are those without donor or other restrictions limiting their use within one year of the statement of financial position date. Financial assets available for general expenditures comprise of the following:

Cash and Cash Equivalents	\$	476,274
Accounts Receivable - Federal and State		447,414
Less: Net Assets With Donor Restrictions		(266,713)
Total	S	656,975

As part of its liquidity management plan, the School monitors liquidity required and cash flows to meet operating needs on a monthly basis. The School structures its financial assets to be available as general expenditures, liabilities, and other obligations come due.

NOTE 3 CONCENTRATION OF CREDIT RISK

The School maintains cash balances held in banks and revolving funds which are insured up to \$250,000 by the Federal Depository Insurance Corporation (FDIC). At times, cash in these accounts exceeds the insured amounts. The School has not experienced any losses in such accounts and believes it is not exposed to any significant credit risk on its cash and cash equivalents.

NOTE 4 LOANS PAYABLE

Paycheck Protection Program Loan

The School obtained a loan in the amount of \$285,495 through the Paycheck Protection Program administrated by the U.S. Small Business Administration, which is part of the Coronavirus Aid Relief and Economic Security Act. The original loan agreement was written prior to the PPP Flexibility Act of 2020 (June 5) and was due over 24 months deferred for six months, Subsequent to this, the law changed the loan deferral terms retroactively. The PPP Flexibility Act and subsequent regulations supersede the loan agreement. The PPP Loan bears interest at a fixed rate of 1.0% per annum, with the first six months of interest deferred, has a term of two years, and is unsecured and guaranteed by the U.S. Small Business Administration, Payment of principal and interest is deferred until the date on which the amount of forgiveness is remitted to the lender or, if the organization fails to apply for forgiveness within 10 months after the covered period, then payment of principal and interest shall begin on that date. These amounts may be forgiven subject to compliance and approval based on the timing and use of these funds in accordance with the program. To the extent that all or part of the PPP Loan is not forgiven, the School will be required to pay interest on the PPP Loan at a rate of 1.0% per annum, and commencing in 2021. Principal and interest payments will be required through the maturity date in 2022.

(10)

(9)

NOTE 4 LOANS PAYABLE (CONTINUED)

Economic Injury Disaster Loan

The School obtained a loan in the amount of \$10,000 through the U.S. Small Business Administration to meet financial obligations and operating expenses that could have been met had the disaster not occurred. The Loan bears interest at a fixed rate of 2.75% per annum and has a term of 30 years.

Charter School Growth Fund Loan

The School obtained a loan in the amount of \$50,000 through the Charter School Growth Fund. The Loan bears no interest as is due on November 2021.

Future maturities under notes payable are as follows:



NOTE 5 EMPLOYEE RETIREMENT

Defined Contribution Plan

The School offers an Internal Revenue Code Section 401(k) retirement plan to each of its qualifying employees. Employer and employee contributions are used to purchase annuity contracts for each participant employee. Employer matching contributions are made as a percentage of elective deferrais for each employee who is eligible for employer contributions. Additionally, the employer may elect to make a discretionary contribution for each qualifying employee for each plan year. The amount of employer contributions used to purchase annuity contracts for the year ended June 30, 2020 was \$37,108.

NOTE 6 NET ASSETS WITH DONOR RESTRICTIONS

Net assets with donor restrictions are restricted for the following purposes. Net assets were released from donor restrictions by incurring expenses satisfying the restricted purpose specified by the donors as follows for the years ended June 30:

Net Assets With Donor Restrictions:	6/30/2019 Additions		Releases		6/30/2020		
Subject to Specific Purpose Expansion in Washington State	\$		\$ 37.000	\$	20.287	s	16.713
Subject to Passage of Time Restrictions							
Expansion of Rooted Campuses		2	250,000				250,000
Total Net Assets With Donor Restrictions	\$		\$ 287,000	\$	20,287	\$	266,713

ROOTED SCHOOL NOTES TO FINANCIAL STATEMENTS JUNE 30, 2020

NOTE 7 RELATED PARTY TRANSACTIONS

In 2017, Rooted School entered into an agreement with The Mind Trust, an Indiana nonprofit corporation, to support the opening of Rooted School-Indianapolis, an affiliated charter school in Indianapolis. Rooted School has supported the affiliated entity by serving as a fiduciary pass through entity for grants through The Mind Trust and the Charter School Growth Fund. For the year ended June 30, 2020, Rooted School passed through a total of \$125,000 to the affiliated charter school in Indianapolis. For a portion of the fiscal year, Rooted School paid a total of \$35,235 of salary expenses for the School Leader of the Indianapolis charter school for which Rooted School has a receivable for this amount as of June 30, 2020.

NOTE 8 FUNCTIONALIZED EXPENSES

The financial statements report certain categories of expenses that are attributed to more than one program or supporting function(s). Therefore, expenses require allocation on a reasonable basis that is consistently applied. The expenses that are allocated include salaries and wages, pension expense, other employee benefits, payroll taxes, other fees for services, office expenses, pinting and postage, information technology, and other expenses, which are allocated on the basis of estimates of time and effort.

NOTE 9 CONTINGENCIES, COMMITMENTS AND UNCERTANTIES

The School has received state and federal funds for specific purposes that are subject to review and audit by the grantor agencies. Although such audits could generate disallowances under terms of the grants, it is believed that any required reimbursement would not be material.

The extent of the impact of COVID-19 on the operational and financial performance of the School will depend on certain developments, including the duration and spread of the outbreak, impact on state and federal funding, donors, employees and vendors; all of which are uncertain and cannot be predicted. At this point, the extent to which COVID-19 may impact the financial condition or results of operations of the School is uncertain.

Specific to the School, COVID-19 may impact various parts of its 2021 operations and financial results, including funding sources determined by economic activity. Management believes the School is taking appropriate actions to mitigate the negative impact. The School received a loan in the amount of \$285,495 to fund payroll, rent, utilities, and interest on mortgages and existing debt through the federal Paycheck Protection Program. These amounts may be forgiven subject to compliance and approval based on the timing and use of these funds in accordance with the program.

(12)

(11)



INDEPENDENT AUDITOR'S REPORT ON INTERNAL CONTROL OVER FINANCIAL REPORTING AND ON COMPLIANCE AND OTHER MATTERS BASED ON AN AUDIT OF FINANCIAL STATEMENTS PERFORMED IN ACCORDANCE WITH GOVERNMENT AUDITING STANDARDS

Board of Directors Rooted School New Orleans, Louisiana

We have audited, in accordance with the auditing standards generally accepted in the United States of America and the standards applicable to financial audits contained in *Government Auditing Standards* issued by the Comptroller General of the United States, the financial statements of Rooted School (the School), a nonprofit public benefit corporation, which comprise the statement of financial position as of June 30, 2020, and the related statements of activities, cash flows, and functional expenses for the year then ended, and the related notes to the financial statements, and have issued our report thereon dated December 11, 2020.

Internal Control Over Financial Reporting

In planning and performing our audit of the financial statements, we considered the School's internal control over financial reporting (internal control) to determine the audit procedures that are appropriate in the circumstances for the purpose of expressing our opinion on the financial statements, but not for the purpose of expressing an opinion on the effectiveness of the School's internal control. Accordingly, we do not express an opinion on the effectiveness of the School's internal control.

A deficiency in internal control exists when the design or operation of a control does not allow management or employees, in the normal course of performing their assigned functions, to prevent or detect and correct misstatements on a timely basis. A *material weakness* is a deficiency or a combination of deficiencies in internal control such that there is a reasonable possibility that a material misstatement of the financial statements will not be prevented or detected and corrected on a timely basis. A *significant deficiency* is a deficiency, or a combination of deficiencies, in internal control that is less severe than a material weakness, yet important enough to merit attention by those charged with governance.

Our consideration of internal control was for the limited purpose described in the first paragraph of this section and was not designed to identify all deficiencies in internal control that might be material weaknesses or significant deficiencies. Given these limitations, during our audit we did not identify any deficiencies in internal control that we consider to be material weaknesses. However, material weaknesses may exist that have not been identified.



(13)

Board of Directors Rooted School

Compliance and Other Matters

As part of obtaining reasonable assurance about whether the School's financial statements are free from material misstatement, we performed tests of its compliance with certain provisions of laws, regulations, contracts, and grant agreements, noncompliance with which could have a direct and material effect on the determination of financial statement amounts. However, providing an opinion on compliance with those provisions was not an objective of our audit, and accordingly, we do not express such an opinion. The results of our tests disclosed no instances of noncompliance or other matters that are required to be reported under *Government Auditing Standards*.

Purpose of this Report

The purpose of this report is solely to describe the scope of our testing of internal control and compliance and the results of that testing, and not to provide an opinion on the effectiveness of the entity's internal control or on compliance. This report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering the entity's internal control and compliance. Accordingly, this communication is not suitable for any other purpose.

Clifton Larson Allen LLP

CliftonLarsonAllen LLP

Glendora, California December 11, 2020

(14)

ROOTED SCHOOL SCHEDULE OF FINDINGS YEAR ENDED JUNE 30, 2020 ROOTED SCHOOL SCHEDULE OF PRIOR YEAR FINDINGS YEAR ENDED JUNE 30, 2020

(16)

There were no findings for the year ended June 30, 2020.

There were no findings for the year ended June 30, 2019.

(15)

ROOTED SCHOOL SCHEDULE OF COMPENSATION, BENEFITS, AND OTHER PAYMENTS TO THE AGENCY HEAD YEAR ENDED JUNE 30, 2020

Agency Head: Jonathan Johnson	
Purpose	Amount
Salary	\$ 103,000
Benefits - Employer Portion of Retirement	2,120
Benefits - Employer Portion of Medical/Dental/Vision	4,505
Benefits - FICA Medicare	 17,918
Total	\$ 127,543

SCHEDULES REQUIRED BY LOUISIANA STATE LAW

(R.S. 24:514 - PERFORMANCE AND STATISTICAL DATA)

(17)



Board of Directors Rooted School New Orleans, Louisiana

We have performed the procedures enumerated below, which were agreed to by Rooted School (the School); the Louisiana Department of Education, and the Louisiana Legislative Auditor (the specified parties), on the performance and statistical data accompanying the annual financial statements of the School for the fiscal year ended June 30, 2020; and to determine whether the specified schedules are free of obvious errors and omissions as provided by the Board of Elementary and Secondary Education (BESE) Bulletin 126, in compliance with Louisiana Revised Statute 24:514 I. Management of the School is responsible for its performance and statistical data. The sufficiency of these procedures is solely the responsibility of the specified parties. Consequently, we make no representation regarding the sufficiency of the procedures enumerated below either for the purpose for which this report has been requested or for any other purpose.

Our procedures and findings relate to the accompanying schedules of supplemental information and are as follows:

General Fund Instructional and Support Expenditures and Certain Local Revenue Sources (Schedule 1)

- We selected a random sample of 25 transactions and reviewed supporting documentation to determine if the sampled expenditures/revenues are classified correctly, based on description and nature of the revenue/expense, and are reported in the proper amounts for each of the following amounts reported on the schedule:
 - Total General Fund Instructional Expenditures,
 - Total General Fund Equipment Expenditures,
 - Total Local Taxation Revenue,
 - Total Local Earnings on Investment in Real Property.
 - · Total State Revenue in Lieu of Taxes,
 - · Nonpublic Textbook Revenue, and
 - Nonpublic Transportation Revenue.

Findings:

None.



(18)

Board of Directors Rooted School

Class Size Characteristics (Schedule 2)

We obtained a list of classes by school, school type, and class size as reported on the schedule.
 We then traced all classes to the October 1st roll books for those classes and determined if the class was accurately classified on the schedule.

Findings:

None.

Education Levels of Public School Staff (NO SCHEDULE)

3. We obtained October 1st PEP data submitted to the Department of Education (or equivalent listing prepared by management), including full-time teachers, principals, and assistant principals by classification, as well as their level of education and experience, and obtained management's representation that the data/listing was complete. We then selected all teachers and the principal, traced to each individual's personnel file, and observed that each individual's education level and experience was property classified on the PEP data or equivalent listing prepared by management.

Findings: None.

Public School Staff Data: Average Salaries (NO SCHEDULE)

4. We obtained June 30th PEP data submitted to the Department of Education (or equivalent listing provided by management) of all classroom teachers, including base salary, extra compensation, and ROTC or rehired retiree status, as well as full-time equivalents, and obtained management's representation that the data/listing was complete. We then selected all teachers, traced to each individual's personnel file, and observed that each individual's salary, extra compensation, and full-time equivalents were properly included on the PEP data (or equivalent listing prepared by management).

Findings: None.

This agreed-upon procedures engagement was performed in accordance with attestation standards established by the American Institute of Certified Public Accountants, and the standards applicable to attestation engagements contained in *Government Auditing Standards*, issued by the United States Comptroller General. We were not engaged to and did not conduct an examination or review, the objective of which would be the expression of an opinion or conclusion, respectively, on the performance and statistical data. Accordingly, we do not express such an opinion or conclusion. Had we performed additional procedures, other matters might have come to our attention that would have been reported to you.

(19)

Board of Directors Rooted School

The purpose of this report is solely to describe the scope of testing performed on the performance and statistical data accompanying the annual financial statements of the (City or Parish School Board or Charter School), as required by Louisiana Revised Statue 24:514.1, and the result of that testing, and not to provide an opinion on control or compliance. Accordingly, this report is not suitable for any other purpose. Under Louisiana Revised Statute 24:513, this report is distributed by the Louisiana Legislative Auditor as a public document.

Clifton Larson Allen LLP

CliftonLarsonAllen LLP

Glendora, California December 11, 2020

ROOTED SCHOOL GENERAL FUND INSTRUCTIONAL AND SUPPORT EXPENDITURES AND CERTAIN LOCAL REVENUE SOURCES SCHEDULE 1 YEAR ENDED JUNE 30, 2020 (SEE INDEPENDENT ACCOUNTANTS' REPORT ON AGREED-UPON PROCEDURES.)

General Fund Instructional and Equipment Expenditures	Column A	c	olumn B
General Fund Instructional Expenditures:			
Teacher and Student Interaction Activities:			
Classroom Teacher Salaries	667,775		
Instructional Staff Employee Benefits	161,984		
Purchased Professional and Technical Services	30,424		
Instructional Materials and Supplies	69,939		
Total Teacher and Student Interaction Activities		s	930,122
Other Instructional Activities			8,783
Pupil Support Services	85,840		
Less: Equipment for Pupil Support Services	-		
Net Pupil Support Services			85,840
Instructional Staff Services	7,010		
Less: Equipment for Instructional Staff Services			
Net Instructional Staff Services			7,010
School Administration	592,073		
Less: Equipment for School Administration			
Net School Administration			592,073
Total General Fund Instructional Expenditures			
(Total of Column B)		\$	1,623,828
Total General Fund Equipment Expenditures			
(Object 730; Functional Series 1000-4000)		\$	-
ocal Revenue Sources			
Other Revenue from Local Sources:			
Contributions and Donations		\$	264,234
Miscellaneous Revenues:			
Local Revenue Trans. From Other LEA			1,068,777
Other Miscellaneous Revenues			146.348
Total Revenues from Local Sources		\$	1,479,359

(20)

(21)

ROOTED SCHOOL CLASS SIZE CHARACTERISTICS SCHEDULE 2 YEAR ENDED JUNE 30, 2020 (SEE INDEPENDENT ACCOUNTANTS' REPORT ON AGREED-UPON PROCEDURES.)

	Class Size Range											
School Type	1-	1-20		1-20		-26	27-33		27-33		34	4+
	Number	Percent	Number	Percent	Number	Percent	Number	Percent				
Elementary	3 8		8	1 1		2						
Elementary Activity Class			Q	<u> </u>		2						
Middle High												
Middle High Activity Class			8			2		S				
High	55	74%	15	20%	1	1%	3	4%				
High Activity Class	1. 1		3									
Combination												
Combination Activity Class	1 S	D.	<u>6</u>	1 - S		2	· ()					

vestment advisory services are offered through CliftonLarsonAllen Wealth Advisor



(22)

Attachment 25 **CMO** Organizational Performance Reports

*None exist at this time as the organization has been incorporated for under one year

Attachment 26Audited Financial Statements

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ROOTED SCHOOL

FINANCIAL STATEMENTS AND SUPPLEMENTARY INFORMATION

YEAR ENDED JUNE 30, 2018



INDEPENDENT AUDITORS' REPORT

Board of Directors Rooted School New Orleans, Louisiana

Report on the Financial Statements

We have audited the accompanying financial statements of Rooted School (the School), a nonprofit public benefit corporation, which comprise the statement of financial position as of June 30, 2018, and the related statements of activities, cash flows, and functional expenses for the year then ended, and the related notes to the financial statements.

Management's Responsibility for the Financial Statements

Management is responsible for the preparation and fair presentation of these financial statements in accordance with accounting principles generally accepted in the United States of America; this includes the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error.

Auditors' Responsibility

Our responsibility is to express an opinion on these financial statements based on our audit. We conducted our audit in accordance with auditing standards generally accepted in the United States of America and the standards applicable to financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States. Those standards require that we plan and perform the audit to obtain reasonable assurance about whether the financial statements are free of material misstatement.

An audit involves performing procedures to obtain audit evidence about the amounts and disclosures in the financial statements. The procedures selected depend on the auditor's judgment, including the assessment of the risks of material misstatement of the financial statements, whether due to fraud or error. In making those risk assessments, the auditor considers internal control relevant to the entity's preparation and fair presentation of the financial statements in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the entity's internal control. Accordingly, we express no such opinion. An audit also includes evaluating the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluating the overall presentation of the financial statements.

We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.



(1)

Board of Directors Rooted School

Opinion

In our opinion, the financial statements referred to on page one present fairly, in all material respects, the financial position of the School as of June 30, 2018, and the changes in its net assets and its cash flows for the year then ended in accordance with accounting principles generally accepted in the United States of America.

Other Matters

Other Information

Our audit was conducted for the purpose of forming an opinion on the School's financial statements as a whole. The accompanying schedule of compensation, benefits, and other payments to the agency head is presented for purposes of additional analysis and are not a required part of the basic financial statements. Such information is the responsibility of management and was derived from and relates directly to the underlying accounting and other records used to prepare the financial statements. The information has been subjected to the auditing procedures applied in the audit of the financial statements and certain additional procedures, including comparing and reconciling such information directly to the underlying accounting and other records used to prepare the financial statements or to the financial statements themselves, and other additional procedures in accordance with auditing standards generally accepted in the United States of America. In our opinion, the information is fairly stated, in all material respects, in relation to the financial statements as a whole.

The schedules required by Louisiana State Law, included as Schedules 1 through 9, are not a required part of the basic financial statements, but are supplementary information required by Louisiana State Law. Such information is the responsibility of management and was derived from and relates directly to the underlying accounting and other records used to prepare the combining financial statements. We have applied certain limited procedures, which are described in the Independent Accountants' Report on Applying Agreed-Upon Procedures. However, we did not audit this information and, accordingly, express no opinion on it.

Other Reporting Required by Government Auditing Standards

In accordance with Government Auditing Standards, we have also issued a report dated September 12, 2018 on our consideration of the School's internal control over financial reporting and on our tests of its compliance with certain provisions of laws, regulations, contracts, and grant agreements and other matters. The purpose of that report is to describe the scope of our testing of internal control over financial reporting and compliance and the results of that testing, and not to provide an opinion on the internal control over financial reporting or on compliance. That report is an integral part of an audit performed in accordance with Government Auditing Standards in considering the School's internal control over financial reporting and compliance.

Clifton Larson Allen LLP

CliftonLarsonAllen LLP

Glendora, California September 12, 2018

(2)

ROOTED SCHOOL STATEMENT OF FINANCIAL POSITION JUNE 30, 2018

ASSETS

CURRENT ASSETS		404.040
Cash and Cash Equivalents	5	164,919
Accounts Receivable - Federal and State		60,684
Total Current Assets		225,603
Total Assets		225.603
LIABILITIES AND NET ASSETS		
CURRENT LIABILITIES		
Accounts Payable and Accrued Liabilities	\$	25,280
Total Current Liabilities		25,280
NET ASSETS		
Unrestricted	\$	200.323
Total Net Assets		200,323
Total Liabilities and Net Assets	\$	225.603

ROOTED SCHOOL STATEMENT OF ACTIVITIES YEAR ENDED JUNE 30, 2018

REVENUES

REVENUES		
State and Local Public School Funding	\$	414,975
Federal Grants		235,631
Donations		853,550
Other Income		541
Total Revenues	1.000	1,504,697
EXPENSES		
Program Services		1,161,056
Management and General		261,847
Total Expenses		1,422,903
CHANGE IN UNRESTRICTED NET ASSETS		81,794
Unrestricted Net Assets - Beginning of Year		118,529
UNRESTRICTED NET ASSETS - END OF YEAR	5	200.323

See accompanying Notes to Financial Statements.

(3)

See accompanying Notes to Financial Statements.

(4)

ROOTED SCHOOL STATEMENT OF CASH FLOWS YEAR ENDED JUNE 30, 2018

CASH FLOWS FROM OPERATING ACTIVITIES Change in Net Assets	\$	81,794
Adjustments to Reconcile Change in Net Assets to Net	4	01,104
Cash Flows Provided by Operating Activities:		
Change in Operating Assets:		
Accounts Receivable - Federal and State		(60,621)
Prepaid Expenses and Other Assets		2,082
Change in Operating Liabilities:		
Accounts Payable and Accrued Liabilities		16,432
Net Cash Flows Provided by Operating Activities		39,687
NET CHANGE IN CASH AND CASH EQUIVALENTS		39,687
Cash and Cash Equivalents - Beginning of Year		125,232
CASH AND CASH EQUIVALENTS - END OF YEAR	\$	164,919

ROOTED SCHOOL STATEMENT OF FUNCTIONAL EXPENSES YEAR ENDED JUNE 30, 2018

Pension Expense Other Employee Benefits Payroll Taxes Legal Expenses Instructional Materials Other Fees for Services Advertising and Promotion Expenses		Program Services	Management and General		Total Expenses	
Salaries and Wages	\$	469,236	s	141,583	5	610,819
		14,909 38,664		5,435 16.020		20,344 54,684
		35,438		10,020		45,661
Legal Expenses				5,426		5,426
Instructional Materials		235,166				235,166
Other Fees for Services		80,787		21,416		102,203
Advertising and Promotion Expenses		-		559		559
Office Expenses		-		5,385		5,385
Occupancy Expenses		150,290		-		150,290
Insurance Expense				9,589		9,589
Other Expenses		26,367		10,990		37,357
Total	S	1,161.056	S	261,847	S	1,422,903

(5)

See accompanying Notes to Financial Statements.

(6)

ROOTED SCHOOL NOTES TO FINANCIAL STATEMENTS JUNE 30, 2018

NOTE 1 SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES

Nature of Activities

The Rooted School (the School) was created as a nonprofit corporation under the laws of the State of Louisiana in 2014. The School applied to the Orleans Parish School Board to operate a Type I charter school. The Orleans Parish School Board approved the charter of the School for a period of five years commencing on July 1, 2017 and ending on June 30, 2022. The school serves eligible students in ninth through twelfth grade.

The School received approximately 43% of its total revenues from federal and state grantors.

Basis of Accounting

The financial statements have been prepared on the accrual method of accounting and accordingly reflect all significant receivables and liabilities.

Basis of Presentation

The accompanying financial statements have been prepared in conformity with accounting principles generally accepted in the United States as prescribed by the Financial Accounting Standards Board.

Net Asset Classes

The School is required to report information regarding its financial position and activities according to three classes of net assets: unrestricted, temporarily restricted, and permanently restricted. Net assets of the School are defined as:

<u>Unrestricted</u> – All resources over which the governing board has discretionary control to use in carrying on the general operations of the School.

<u>Temporarily Restricted</u> - These net assets are restricted by donors to be used for specific purposes. The School does not currently have any temporarily restricted net assets.

<u>Permanently Restricted</u> – These net assets are permanently restricted by donors and cannot be used by the School. The School does not currently have any permanently restricted net assets.

Cash and Cash Equivalents

The School defines its cash and cash equivalents to include only cash on hand, demand deposits, and liquid investments with original maturities of three months or less.

Use of Estimates

The preparation of financial statements in conformity with accounting principles generally accepted in the United States of America requires management to make estimates and assumptions that affect the reported amounts of assets, liabilities, and disclosures. Accordingly, actual results could differ from those estimates.

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ROOTED SCHOOL NOTES TO FINANCIAL STATEMENTS JUNE 30, 2018

NOTE 1 SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (CONTINUED)

Receivables

Accounts receivable primarily represent amounts due from federal and state governments as of June 30, 2018. Management believes that all receivables are fully collectible, therefore no provisions for uncollectible accounts were recorded.

Compensated Absences

The School does not allow employees to carryover unused vacation. Accordingly, there were no accumulated compensated absence benefits at June 30, 2018.

Revenue

The School's primary sources of funding are through the State Public School Fund and federal grants, as well as private donations. Federal grants are recorded on a cost reimbursement basis. An accrual is made when eligible expenses are incurred.

Contributions

All contributions are considered to be available for unrestricted use unless specifically restricted by the donor. Amounts received that are restricted to specific use or future periods are reported as temporarily restricted. Restricted contributions that are received and released in the same period are reported as unrestricted revenue. Unconditional promises to give expected to be received in one year or less are recorded at net realizable value. Unconditional promises to give expected to be received in more than one year are recorded at fair market value at the date of the promise. Conditional promises to give are not recognized until they become unconditional, that is, when the conditions on which they depend are substantially met.

Income Taxes

The School is a nonprofit entity exempt from the payment of income taxes under Internal Revenue Code Section 501(c)(3). Accordingly, no provision has been made for income taxes. Management has determined that all income tax positions are more likely than not of being sustained upon potential audit or examination; therefore, no disclosures of uncertain income tax positions are required. The School files informational returns in the U.S. federal jurisdiction. The statute of limitations for federal purposes is generally three years.

Functional Allocation of Expenses

Costs of providing the School's programs and other activities have been presented in the statement of functional expenses. During the year, such costs are accumulated into separate groupings as either direct or indirect. Indirect or shared costs are allocated among program and support services by a method that best measures the relative degree of benefit.

Evaluation of Subsequent Events

The School has evaluated subsequent events through September 12, 2018, the date these financial statements were available to be issued.

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ROOTED SCHOOL NOTES TO FINANCIAL STATEMENTS JUNE 30, 2018

NOTE 2 CONCENTRATION OF CREDIT RISK

The School maintains cash balances held in banks and revolving funds which are insured up to \$250,000 by the Federal Depository Insurance Corporation (FDIC). At times, cash in these accounts exceeds the insured amounts. The School has not experienced any losses in such accounts and believes it is not exposed to any significant credit risk on its cash and cash equivalents.

NOTE 3 EMPLOYEE RETIREMENT

Defined Contribution Plan

The School offers an Internal Revenue Code Section 401(k) retirement plan to each of its qualifying employees. Employer and employee contributions are used to purchase annuity contracts for each participant employee. Employer matching contributions are made as a percentage of elective deferrals for each employee who is eligible for employer contributions. Additionally, the employer may elect to make a discretionary contribution for each qualifying employee for each plan year. The amount of employer contributions used to purchase annuity contracts for the year ended June 30, 2018 was \$20,344.

NOTE 4 OPERATING LEASES

The School leases it facilities under several lease agreements where the last lease expires in June of 2019. Lease expense under these agreements for the year ended June 30, 2018 was \$90,000.

Future minimum lease payments are as follows:





NOTE 5 CONTINGENCIES

The School has received state and federal funds for specific purposes that are subject to review and audit by the grantor agencies. Although such audits could generate disallowances under terms of the grants, it is believed that any required reimbursement would not be material.



INDEPENDENT AUDITOR'S REPORT ON INTERNAL CONTROL OVER FINANCIAL REPORTING AND ON COMPLIANCE AND OTHER MATTERS BASED ON AN AUDIT OF FINANCIAL STATEMENTS PERFORMED IN ACCORDANCE WITH GOVERNMENT AUDITING STANDARDS

Board of Directors Rooted School New Orleans, Louisiana

We have audited, in accordance with the auditing standards generally accepted in the United States of America and the standards applicable to financial audits contained in *Government Auditing Standards* issued by the Comptroller General of the United States, the financial statements of Rooted School (the School), a nonprofit public benefit corporation, which comprise the statement of financial position as of June 30, 2018, and the related statements of activities, cash flows, and functional expenses for the year then ended, and the related notes to the financial statements, and have issued our report thereon dated September 12, 2018.

Internal Control Over Financial Reporting

In planning and performing our audit of the financial statements, we considered the School's internal control over financial reporting (internal control) to determine the audit procedures that are appropriate in the circumstances for the purpose of expressing our opinion on the financial statements, but not for the purpose of expressing an opinion on the effectiveness of the School's internal control. Accordingly, we do not express an opinion on the effectiveness of the School's internal control.

A deficiency in internal control exists when the design or operation of a control does not allow management or employees, in the normal course of performing their assigned functions, to prevent or detect and correct misstatements on a timely basis. A *material weakness* is a deficiency or a combination of deficiencies in internal control such that there is a reasonable possibility that a material misstatement of the financial statements will not be prevented or detected and corrected on a timely basis. A *significant deficiency* is a deficiency, or a combination of deficiencies, in internal control that is less severe than a material weakness, yet important enough to merit attention by those charged with governance.

Our consideration of internal control was for the limited purpose described in the first paragraph of this section and was not designed to identify all deficiencies in internal control that might be material weaknesses or significant deficiencies. Given these limitations, during our audit we did not identify any deficiencies in internal control that we consider to be material weaknesses. However, material weaknesses may exist that have not been identified.



(10)

(8)

Board of Directors Rooted School

Compliance and Other Matters

As part of obtaining reasonable assurance about whether the School's financial statements are free from material misstatement, we performed tests of its compliance with certain provisions of laws, regulations, contracts, and grant agreements, noncompliance with which could have a direct and material effect on the determination of financial statement amounts. However, providing an opinion on compliance with those provisions was not an objective of our audit, and accordingly, we do not express such an opinion. The results of our tests disclosed no instances of noncompliance or other matters that are required to be reported under *Government Auditing Standards*.

Purpose of this Report

The purpose of this report is solely to describe the scope of our testing of internal control and compliance and the results of that testing, and not to provide an opinion on the effectiveness of the entity's internal control or on compliance. This report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering the entity's internal control and compliance. Accordingly, this communication is not suitable for any other purpose.

Clifton Larson Allen LLP

CliftonLarsonAllen LLP

Glendora, California September 12, 2018 ROOTED SCHOOL SCHEDULE OF FINDINGS YEAR ENDED JUNE 30, 2018

There were no findings for the year ended June 30, 2018.

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ROOTED SCHOOL SCHEDULE OF PRIOR YEAR FINDINGS YEAR ENDED JUNE 30, 2018

There were no findings for the year ended June 30, 2017 as this is the first year of operations.

ROOTED SCHOOL SCHEDULE OF COMPENSATION, BENEFITS, AND OTHER PAYMENTS TO THE AGENCY HEAD YEAR ENDED JUNE 30, 2018

Agency Head: Jonathan Johnson

Agency Head: Jonathan Johnson Purpose	Amount
Salary	\$ 90,000
Benefits - Employer Portion of Retirement	4,229
Benefits - Employer Portion of Medical/Dental/Vision	4,359
Travel	
Cell Phone Reimbursement	-
Reimbursements	
Conferences	-
Benefits - FICA Medicare	10,072
Other Compensation-Security	
Community Relations	
Professional Development	
Total	\$ 108,660

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INDEPENDENT ACCOUNTANTS' REPORT ON APPLYING AGREED-UPON PROCEDURES

Board of Directors Rooted School New Orleans, Louisiana

We have performed the procedures enumerated below, which were agreed to by Rooted School (the School); the Louisiana Department of Education, and the Louisiana Legislative Auditor (the specified parties), on the performance and statistical data accompanying the annual financial statements of the School for the fiscal year ended June 30, 2018; and to determine whether the specified schedules are free of obvious errors and omissions as provided by the Board of Elementary and Secondary Education (BESE) Bulletin 126, in compliance with Louisiana Revised Statute 24:514 I. Management of the School is responsibility of the specified parties. Consequently, we make no representation regarding the sufficiency of the procedures enumerated below either for the purpose for which this report has been requested or for any other purpose.

Our procedures and findings relate to the accompanying schedules of supplemental information and are as follows:

General Fund Instructional and Support Expenditures and Certain Local Revenue Sources (Schedule 1)

- We selected a random sample of 25 transactions and reviewed supporting documentation to determine if the sampled expenditures/revenues are classified correctly, based on description and nature of the revenue/expense, and are reported in the proper amounts for each of the following amounts reported on the schedule:
 - · Total General Fund Instructional Expenditures,
 - · Total General Fund Equipment Expenditures,
 - · Total Local Taxation Revenue,
 - · Total Local Earnings on Investment in Real Property,
 - · Total State Revenue in Lieu of Taxes,
 - · Nonpublic Textbook Revenue, and
 - · Nonpublic Transportation Revenue.

Findings: None.



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SCHEDULES REQUIRED BY LOUISIANA STATE LAW

(R.S. 24:514 - PERFORMANCE AND STATISTICAL DATA)

Board of Directors Rooted School

Education Levels of Public School Staff (Schedule 2)

- 2. We reconciled the total number of full-time classroom teachers per the schedule "Experience of Public Principals, Assistant Principals, and Full-time Classroom Teachers" (Schedule 4) to the combined total number of full-time classroom teachers per this schedule and to school board supporting payroll records as of October 1st.
- 3. We reconciled the combined total of principals and assistant principals per the schedule "Experience of Public Principals, Assistant Principals, and Full-time Classroom Teachers" (Schedule 4) to the combined total of principals and assistant principals per this schedule.
- 4. We obtained a list of full-time teachers, principals, and assistant principals by classification as of October 1st and as reported on the schedule. We traced all teachers to the individual's personnel file and determine if the individual's education level was accurately classified on the schedule.

Findings:

None. There were no differences noted.

Number and Type of Public Schools (Schedule 3)

5. We obtained a list of schools by type as reported on the schedule. We compared the list to the schools and grade levels as reported on the Title 1 Grants to Local Educational Agencies (CFDA 84.010) application and/or the National School Lunch Program (CFDA 10.555) application.

Findings: None

Experience of Public Principals, Assistant Principals, and Full-time Classroom Teachers (Schedule 4)

6. We obtained a list of full-time teachers, principals, and assistant principals by classification as of October 1st and as reported on the schedule and traced the same sample used in Procedure 4 to the individual's personnel file and determined if the individual's experience was accurately classified on the schedule.

Findings:

None.

Public School Staff Data: Average Salaries (Schedule 5)

- 7. We obtained a list of all classroom teachers including their base salary, extra compensation, and ROTC or rehired retiree status as well as full-time equivalent as reported on the schedule and traced all teachers to the individual's personnel file and determined if the individual's salary, extra compensation, and full-time equivalents were accurately included on the schedule.
- 8. We recalculated the average salaries and full-time equivalents reported in the schedule.

Findings: None

Class Size Characteristics (Schedule 6)

9. We obtained a list of classes by school, school type, and class size as reported on the schedule and reconciled school type classifications to Schedule 3 data, as obtained in Procedure 5. We then traced all classes to the October 1st roll books for those classes and determined if the class was accurately classified on the schedule.

Findings:

None.

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Board of Directors Rooted School

Louisiana Educational Assessment Program (LEAP) (Schedule 7)

10. We obtained test scores as provided by the testing authority and reconciled scores as reported by the testing authority to scores reported in the schedule by (Any Parish School Board).

Findings:

Not applicable.

Graduation Exit Examination (GEE) (Schedule 8)

- 11. We obtained test scores as provided by the testing authority and reconciled scores as reported by the testing authority to scores reported in the schedule by the School.
 - The Graduation Examination (GEE) is no longer administered. (This schedule is no longer applicable.)

iLEAP Tests (Schedule 9)

- 12. We obtained test scores as provided by the testing authority and reconciled scores as reported by the testing authority to scores reported in the schedule by the School.
 - Findings: None

None

This agreed-upon procedures engagement was performed in accordance with attestation standards established by the American Institute of Certified Public Accountants, and the standards applicable to attestation engagements contained in Government Auditing Standards, issued by the United States Comptroller General. We were not engaged to and did not conduct an examination or review, the objective of which would be the expression of an opinion or conclusion, respectively, on the performance and statistical data. Accordingly, we do not express such an opinion or conclusion. Had we performed additional procedures, other matters might have come to our attention that would have been reported to you.

The purpose of this report is solely to describe the scope of testing performed on the performance and statistical data accompanying the annual financial statements of the School, as required by Louisiana Revised Statue 24:514.1, and the result of that testing, and not to provide an opinion on control or compliance. Accordingly, this report is not suitable for any other purpose. Under Louisiana Revised Statute 24:513, this report is distributed by the Louisiana Legislative Auditor as a public document.

Clifton Larson Allen LLP

CliftonLarsonAllen LLP

Glendora, California September 12, 2018

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ROOTED SCHOOL GENERAL FUND INSTRUCTIONAL AND SUPPORT EXPENDITURES AND CERTAIN LOCAL REVENUE SOURCES SCHEDULE 1 YEAR ENDED JUNE 30, 2018 (SEE INDEPENDENT ACCOUNTANTS' REPORT ON AGREED-UPON PROCEDURES.)

General Fund Instructional and Equipment Expenditures	Column A	C	olumn B
Seneral Fund Instructional Expenditures:			
Teacher and Student Interaction Activities:			
Classroom Teacher Salaries	236,750		
Other Instructional Staff Activities	1,467		
Instructional Staff Employee Benefits	58,649		
Purchased Professional and Technical Services	29,335		
instructional Materials and Supplies	207,247		
Instructional Equipment	10,875		
Total Teacher and Student Interaction Activities		\$	544,323
Other Instructional Activities			
Pupil Support Services	8,096		
Less: Equipment for Pupil Support Services			
Net Pupil Support Services			8,096
Instructional Staff Services	16,943		
Less: Equipment for Instructional Staff Services			
Net Instructional Staff Services			16,943
School Administration	445,661		
Less: Equipment for School Administration	(991)		
Net School Administration			444,670
Total General Fund Instructional Expenditures			
(Total of Column B)		\$	1,014,032
Total General Fund Equipment Expenditures			
(Object 730; Functional Series 1000-4000)		\$	9,884
ocal Revenue Sources	-13-0 (2), (2) (2)		
Earnings on Investments:			
Interest on Investments		\$	8
Other Revenue from Local Sources:			
Contributions and Donations			853,550
Revenue from Judgements/Court Orders			
discellaneous Revenues:			
Other Miscellaneous Revenues			541
Total Revenues from Local Sources		\$	854,091

ROOTED SCHOOL EDUCATION LEVELS OF PUBLIC SCHOOL STAFF SCHEDULE 2 YEAR ENDED JUNE 30, 2018 (SEE INDEPENDENT ACCOUNTANTS' REPORT ON AGREED-UPON PROCEDURES.)

As of October 1, 2017 Full-time Classroom Teachers Principals & Assistant Principals Certificated Uncertificated Certificated Uncertificated Number Percent Number Percent Number Percent Category Less than a Bachelor's Degree Bachelor's Degree Master's Degree 0% 0% 0% 0% 100% 67% 33% 0% 0% 0% 0% 0% 33% 33% 33% 0% Master's Degree + 30 0% 0% Specialist in Education 0% 0% Pd.D or Ed. D 0% Total 1 100% 3 100% 100%

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ROOTED SCHOOL NUMBER AND TYPE OF PUBLIC SCHOOLS SCHEDULE 3 YEAR ENDED JUNE 30, 2018 (SEE INDEPENDENT ACCOUNTANTS' REPORT ON AGREED-UPON PROCEDURES.)

Туре	Number
Elementary	
Middle Jr. High	
Secondary	1
Combination	
Total	1

ROOTED SCHOOL EXPERIENCE OF PUBLIC PRINCIPALS, ASSISTANT PRINCIPALS, AND FULLTIME CLASSROOM TEACHERS SCHEDULE 4 YEAR ENDED JUNE 30, 2018 (SEE INDEPENDENT ACCOUNTANTS' REPORT ON AGREED-UPON PROCEDURES.)

	0-1 Yr.	2-3 Yrs.	4-10 Yrs.	11-14 Yrs.	15-19 Yrs.	20-24 Yrs.	25+ Yrs.	Total
Assistant Principals			1				1	2
Principals		1						1
Classroom Teachers			4					4
Total	0	1	5	0	0	0	1	7

100	202	κ.	

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ROOTED SCHOOL PUBLIC SCHOOL STAFF DATA: AVERAGE SALARIES SCHEDULE 5 YEAR ENDED JUNE 30, 2018 (SEE INDEPENDENT ACCOUNTANTS' REPORT ON AGREED-UPON PROCEDURES.)

All Classroom Teachers

59,500.00 \$

59,500.00 \$

\$

\$

Average Classroom Teachers Salary

Including Extra Compensation Average Classroom Teachers Salary Excluding Extra Compensation

Number of Teacher Full-time Equivalents (FTES) used in Computation of Average Salaries Classroom Teachers, Excluding ROTC, Rehired Retirees and Flagged Salary Reductions

59,500.00

59,500.00

ROOTED SCHOOL
CLASS SIZE CHARACTERISTICS
SCHEDULE 6
YEAR ENDED JUNE 30, 2018
(SEE INDEPENDENT ACCOUNTANTS' REPORT ON AGREED-UPON PROCEDURES.)

School Type	Class Size Range								
	1-20		21-26		27-33		34+		
	Number	Percent	Number	Percent	Number	Percent	Number	Percent	
Elementary	1								
Elementary Activity Class									
Middle High									
Middle High Activity Class									
High	2	100%							
High Activity Class	1								
Combination									
Combination Activity Class									

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- 62	577	η.	

ROOTED SCHOOL LOUISIANA EDUCATIONAL ASSESSMENT PROGRAM (LEAP) SCHEDULE 7 YEAR ENDED JUNE 30, 2018 (SEE INDEPENDENT ACCOUNTANTS' REPORT ON AGREED-UPON PROCEDURES.)

District Achievement		E	inglish Lar	guage Ar	ts				Mathe	metics		
Level Results	20	18	20	47	20	16	20	18	20	17	20	16
Students	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Grade 4												
Advanced	N/A	N/A	N/A	N/A	N/A.	N/A	N/A	N/A.	N/A	N/A	N/A	N/A
Mastery	N/A	N/A	N/A	N/A	N/A.	N/A	N/A	N/A.	N/A	NVA	N/A	N/A
Basic	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Approaching Basic	N/A	N/A	N/A	N/A	N/A	N/A	N/A	NA	N/A	N/A	N/A	N/A
Unsatisfactory	N/A	N/A	N/A	N/A	N/A.	N/A	N/A	N/A.	N/A	N/A	N/A	N/A
Total	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A

District Achievement	1		Scie	ence					Social	Studies		
Level Results	20	18	20)17	20	18	20	18	20	017	2018	
Students	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Grade 4	1											
Advanced	N/A	N/A	N/A	N/A	N/A.	N/A	N/A	N/A.	N/A	N/A	N/A	N/A
Mastery	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A.	N/A	N/A.	N/A	N/A
Basic	N/A	N/A										
Approaching Basic	N/A	N/A	N/A	N/A	N/A	N/A	N/A	NIA	N/A	N/A	N/A	N/A
Unsatisfactory	N/A	N/A										
Total	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A.	N/A	N/A	N/A	N/A

District Achievement		E	inglish Lar	nguage Ar	ts				Mathe	matics		
Level Results	20	/18	20)17	20	18	20	18	20	17	2016	
Students	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Grade 8												
Advanced	N/A	N/A	N/A	N/A	N/A.	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Mastery	N/A	N/A	N/A	N/A	N/A.	N/A	N/A	N/A	N/A	NVA	N/A	N/A
Basic	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Approaching Basic	N/A	N/A	N/A	N/A	N/A.	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Unsatisfactory	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A,	N/A	N/A
Total	N/A	N/A	N/A	N/A	N/A	N/A	N/A	NA	N/A	N/A	N/A	N/A

District Achievement			Scie	ince					Social	Studies		
Level Results	20	18	20	17	20	116	20	18	20	117	2016	
Students	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Grade 8												
Advanced	N/A	N/A	N/A	N/A.	N/A.	N/A	N/A	N/A.	N/A	N/A.	N/A	N/A
Mastery	N/A	N/A										
Basic	N/A	N/A	N/A	N/A	N/A.	N/A	N/A	N/A.	N/A	N/A	N/A	N/A
Approaching Basic	N/A	N/A										
Unsatisfactory	N/A	N/A										
Total	N/A	N/A	N/A	N/A	N/A	N/A	N/A	NA	N/A	N/A	N/A	N/A

ROOTED SCHOOL GRADUATION EXIT EXAM SCHEDULE 8 YEAR ENDED JUNE 30, 2018 (SEE INDEPENDENT ACCOUNTANTS' REPORT ON AGREED-UPON PROCEDURES.)

The Graduation Exit Examination is no longer administered. The Schedule is no longer applicable.

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ROOTED SCHOOL iLEAP TESTS SCHEDULE 9 YEAR ENDED JUNE 30, 2018 (SEE INDEPENDENT ACCOUNTANTS' REPORT ON AGREED-UPON PROCEDURES.)

District Achievement Level	English Lar	iguage Arts	Mathe	matics	Scie	ence	Social	Studies
Results	20	2018		118	20	18	2018	
Grade 3 Students	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Advanced	N/A	N/A	NIA	N/A	NGA	N/A	N/A.	N/A
Mastery	N/A	N/A	NA	N/A	N/A	N/A	N/A	N/A
Basic	N/A	N/A	N/A	N/A	91/A	N/A	N/A	N/A
Approaching Basic	N/A	N/A	N/A.	N/A	MA	N/A	NA	N/A
Unsatisfactory	N/A	N/A.	NA	N/A	N/A	N/A	N/A	N/A
Total	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A

District Achievement Level	English La	nguage Arts	Mathe	matics	Scie	ence	Social	Studies
Results	20	2018		118	20	118	20)18
Grade 5 Students	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Advanced	N/A	N/A	N/A	N/A	N/A	N/A	M/A	N/A
Mastery	N/A	N/A.	N/A	N/A	N/A	N/A	N/A	N/A
Basic	N/A	N/A.	NI(A	N/A	NIGA	N/A	N/A	N/A
Approaching Basic	N/A.	N/A	N/A	N/A	N/A	N/A	11/A	N/A
Unsatisfactory	N/A	N/A	N/A.	N/A	N/A	N/A	N/A	N/A
Total	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A

District Achievement Level	English Lar	iguage Arts	Mathe	matics	Scie	ince	Social	Studies
Results	20	2018		118	20	18	2018	
Grade 6 Students	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Advanced	N/A.	N/A	N/A.	N/A	N/A.	N/A	N/A	N/A.
Mastery	N/A	N/A	N/A.	N/A	N/A	N/A	N/A	N/A
Basic	N/A.	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Approaching Basic	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Unsatisfactory	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Total	N/A	N/A	NA	N/A	N/A	N/A	MA	N/A

District Achievement Level	English Lar	iguage Arts	Mathe	matics	Scit	ince	Social	Studies
Results	20	2018		18	20	18	2018	
Grade 7 Students	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Advanced	N/A	N/A	N/A	N/A	N/A	N/A	N/A,	N/A
Mastery	N/A.	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Basic	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Approaching Basic	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Unsatisfactory	N/A.	N/A	N/A.	N/A	N/A	N/A	N/A	N/A
Total	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A

ROOTED SCHOOL iLEAP TESTS (CONTINUED) SCHEDULE 9 YEAR ENDED JUNE 30, 2018 (SEE INDEPENDENT ACCOUNTANTS' REPORT ON AGREED-UPON PROCEDURES.)

District Achievement Level	English Lar	guage Arts	Mathe	matics	Scie	ance	Social	Studies
Results	20	17	20	17	20	117	20	117
Grade 3 Students	Number			Percent	Number	Percent	Number	Percent
Advanced	N/A	N/A	N/A	N/A	NGA	N/A	N/A	N/A
Mastery	N/A	N/A	N/A	N/A	NA	N/A	N/A	N/A
Basic	N/A	N/A	N/A	N/A	91/A	N/A	N/A	N/A
Approaching Basic	N/A	N/A	N/A	N/A	M6A.	N/A	NA	N/A
Unsatisfactory	N/A	N/A	NIA	N/A	N/A	N/A	N/A	N/A
Total	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A

District Achievement Level	English Lar	nguage Arts	Mathe	matics	Scie	Ince	Social	Studies
Results	20	2017		17	20	17	20	017
Grade 5 Students	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Advanced	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Mastery	N/A	N/A	N/A	N/A	N/A	N/A	NA	N/A
Basic	N/A	N/A	NIG	N/A	N/A.	N/A	N/A	N/A
Approaching Basic	N/A	N/A	NIGA.	N/A	N/A	N/A	N/A	N/A
Unsatisfactory	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A.
Total	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A

District Achievement Level	English Lar	iguage Arts	Mathe	matics	Scie	ince	Social	Studies
Results	20	17	20	117	20	17	2017	
Grade 6 Students	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Advanced	N/A.	N/A	N/A	N/A	N/A.	N/A	N/A	N/A
Mastery	N/A	N/A	N/A	N/A	N/A	N/A	NA	N/A
Basic	N/A.	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Approaching Basic	N/A	N/A	N/A	N/A	N/A.	N/A	N/A	N/A
Unsatisfactory	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Total	N/A	N/A	N/A	N/A	N/A	N/A	NGA	N/A

District Achievement Level	English Language Arts 2017		Mathematics 2017		Science 2017		Social Studies 2017	
Results								
Grade 7 Students	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Advanced	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Mastery	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Basic	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Approaching Basic	N/A	N/A	N/A	N/A	N/A	N/A	NA	N/A
Unsatisfactory	N/A.	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Total	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A

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ROOTED SCHOOL iLEAP TESTS (CONTINUED) SCHEDULE 9 YEAR ENDED JUNE 30, 2018 (SEE INDEPENDENT ACCOUNTANTS' REPORT ON AGREED-UPON PROCEDURES.)

District Achievement Level	English Language Arts 2016		a Mathematics 2016		Science 2016		Social Studies 2016	
Results								
Grade 3 Students	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Advanced	N/A	N/A.	NIG	N/A	NIGA	N/A	N/A	N/A
Mastery	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Basic	N/A	N/A,	N/6A	N/A	51/A	N/A	N/A	N/A
Approaching Basic	N/A	N/A	NGA	N/A	N/64	N/A	NGA	N/A
Unsatisfactory	N/A	N/A.	N/A	N/A	N/A	N/A	N/A	N/A
Total	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A

District Achievement Level	English Language Arts 2016		Mathematics 2016		Science 2016		Social Studies 2016	
Results								
Grade 5 Students	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Advanced	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Mastery	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Basic	N/A	N/A	NICA	N/A	NIGA	N/A,	N/A	N/A
Approaching Basic	N/A	N/A	N10A	N/A	N/A.	N/A	346A.	N/A
Unsatisfactory	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A.
Total	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A

District Achievement Level	English Language Arts 2016		Mathematics 2016		Science 2016		Social Studies 2016	
Results								
Grade 6 Students	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Advanced	N/A.	N/A	N/A	N/A	N/A.	N/A	N/A	N/A.
Mastery	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Basic	N/A.	N/A	N/A	N/A	N/A.	N/A	N/A	N/A
Approaching Basic	N/A	N/A	NA	N/A	N/A	N/A	N/A	N/A
Unsatisfactory	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Total	N/A	N/A	NIGA.	N/A	N/A	N/A	MA	N/A

District Achievement Level	English Language Arts 2016		Mathematics 2016		Science 2016		Social Studies 2016	
Results								
Grade 7 Students	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Advanced	N/A	N/A	N/A	N/A	N/A	N/A	N/A,	N/A
Mastery	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Basic	N/A	N/A,	N/A	N/A	N/A	N/A	N/A	N/A
Approaching Basic	N/A	N/A	N/6A	N/A	N/A	N/A	N/A	N/A
Unsatisfactory	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Total	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A



CliffonLarsonAlien LLP CLAconnect.com

INDEPENDENT ACCOUNTANT'S REPORT ON APPLYING AGREED-UPON PROCEDURES

Board of Directors Rooted School New Orleans, LA

We have performed the procedures enumerated below, which were agreed to by Rooted School (the School) and the Legislative Auditor, State of Louisiana, to assist the entity in complying with the requirements of the Louisiana Legislative Auditor's (LLA) Statewide Agreed-Upon Procedures (SAUPs) for the fiscal year ended June 30, 2018. The School's management is responsible for compliance with these requirements. The sufficiency of these procedures is solely the responsibility of the specified users of this report. Consequently, we make no representation regarding the sufficiency of the procedures described below either for the purpose for which this report has been requested or for any other purpose.

Our procedures and findings are as follows:

Written Policies and Procedures

- CLA obtained Rooted School's written policies and procedures and observed if those written policies and procedures addressed each of the following financial/business functions:
 - a) Budgeting, including preparing, adopting, monitoring, and amending the budget
 - b) Purchasing, including (1) how purchases are initiated; (2) how vendors are added to the vendor list; (3) the preparation and approval process of purchase requisitions and purchase orders; (4) controls to ensure compliance with the public bid law; and (5) documentation required to be maintained for all bids and price quotes.
 - c) Disbursements, including processing, reviewing, and approving
 - d) Receipts, including receiving, recording, and preparing deposits Also, policies and procedures should include management's actions to determine the completeness of all collections for each type of revenue or agency fund additions (e.g. periodic confirmation with outside parties, reconciliation to utility billing after cutoff procedures, reconciliation of traffic ticket number sequences, agency fund forfeiture monies confirmation).
 - Payroll/Personnel, including (1) payroll processing, and (2) reviewing and approving time and attendance records, including leave and overtime worked.
 - f) Contracting, including (1) types of services requiring written contracts, (2) standard terms and conditions, (3) legal review, (4) approval process, and (5) monitoring process



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- g) Credit Cards (and debit cards, fuel cards, P-Cards, if applicable), including (1) how cards are to be controlled, (2) allowable business uses, (3) documentation requirements, (4) required approvers, and (5) monitoring card usage
- h) Travel and expense reimbursement, including (1) allowable expenses, (2) dollar thresholds by category of expense, (3) documentation requirements, and (4) required approvers
- i) Ethics, including (1) the prohibitions as defined in Louisiana Revised Statute 42:1111-1121, (2) actions to be taken if an ethics violation takes place, (3) system to monitor possible ethics violations, and (4) requirement that all employees, including elected officials, annually attest through signature verification that they have read the entity's ethics policy. Note: Ethics requirements are not applicable to nonprofits.
- j) Debt Service, including (1) debt issuance approval, (2) EMMA reporting requirements, (3) debt reserve requirements, and (4) debt service requirements.

Results: The written policies and procedures addressed each of the above financial/business functions.

Board or Finance Committee

- CLA obtained and read the board/finance committee minutes for the fiscal period, as well as the board's enabling legislation, charter, bylaws, or equivalent document in effect during the fiscal period, and:
 - CLA observed that the managing board met (with a quorum) at least monthly, or on a frequency in accordance with the board's enabling legislation, charter, or other equivalent document.
 - b) CLA observed that the minutes referenced or included financial activity relating to public funds.
 - c) Results: The board minutes reviewed met with a quorum at least monthly. Those minutes referenced included monthly budget-to-actual comparisons and financial activity relating to public funds.

Bank Reconciliations

- CLA obtained a listing of client bank accounts from management and management's representation that the listing is complete.
- 4. Using the listing provided by management, CLA selected all of the entity's bank accounts (if five accounts or less) or one-third of the bank accounts on a three year rotating basis (if more than 5 accounts). For each of the bank accounts selected, CLA obtained bank statements and reconciliations for all months in the fiscal period and report whether:
 - a) Bank reconciliations have been prepared;
 - Bank reconciliations include evidence that a member of management or a board member (with no involvement in the transactions associated with the bank account) has reviewed each bank reconciliation; and

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INDEPENDENT ACCOUNTANT'S REPORT ON APPLYING AGREED-UPON PROCEDURES

c) If applicable, management has documentation reflecting that it has researched reconciling items that have been outstanding for more than 12 months as of the end of the fiscal period.

Results: Bank reconciliations were prepared. Bank reconciliations included evidence that a member of management or a board member (with no involvement in the transactions associated with the bank account) has reviewed each bank reconciliation. There were no reconciling items that have been outstanding for more than 12 months as of the end of the fiscal period.

Collections

- Obtain a listing of deposit sites for the fiscal period where deposits for cash/checks/money orders (cash) are prepared and management's representation that the listing is complete. Randomly select 5 deposit sites of less than 5).
- 6. For each deposit site selected, obtain a listing of collection locations and management's representation that the listing is complete. Randomly select one collection location for each deposit site (i.e. 5 collection locations for 5 deposit sites), obtain and inspect written policies and procedures relating to employee job duties (if no written policies or procedures, inquire of employees about their job duties) at each collection location, and observe that job duties are properly segregated at each collection location such that:
 - a) Employees that are responsible for cash collections do not share cash drawers/registers.
 - b) Each employee responsible for collecting cash is not responsible for preparing/making bank deposits, unless another employee/official is responsible for reconciling collection documentation (e.g. pre-numbered receipts) to the deposit.
 - c) Each employee responsible for collecting cash is not responsible for posting collection entries to the general ledger or subsidiary ledgers, unless another employee/official is responsible for reconciling ledger postings to each other and to the deposit.
 - d) The employee(s) responsible for reconciling cash collections to the general ledger and/or subsidiary ledgers, by revenue source and/or agency fund additions are not responsible for collecting cash, unless another employee verifies the reconciliation.
- Inquire of management that all employees who have access to cash are covered by a bond or insurance policy for theft.
- 8. Randomly select two deposit dates for each of the 5 bank accounts selected for procedure #3 under "Bank Reconciliations" above (select the next deposit date chronologically if no deposits were made on the dates randomly selected and randomly select a deposit if multiple deposits are made on the same day). Alternately, the practitioner may use a source document other than bank statements when selecting the deposit dates for testing, such as a cash collection log, daily revenue report, receipt book, etc. Obtain supporting documentation for each of the 10 deposits and:
 - a) Observe that receipts are sequentially pre-numbered.
 - b) Trace sequentially pre-numbered receipts, system reports, and other related collection documentation to the deposit slip.
 - c) Trace the deposit slip total to the actual deposit per the bank statement.

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- d) Observe that the deposit was made within one business day of receipt at the collection location (within one week if the depository is more than 10 miles from the collection location or the deposit is less than \$100.
- e) Trace the actual deposit per the bank statement to the general ledger

Results: Written documentation specifies that the persons responsible for collecting cash are covered by insurance policies. The only cash collection site is the main office of the School. Due to the low amount of cash collection activity and the limited number of office personnel at the School, the responsibilities of depositing cash and reconciling the bank accounts are performed by the same individual but are separated from the collection of cash and the recording of transactions.

Written documentation specifies that the entity has a formal process to reconcile cash collections to the general ledger and/or subsidiary ledgers, by revenue source and/or agency fund additions, by a person who is not responsible for cash collections in the cash collection location selected.

The selected deposit dates were traced to complete collection documentation, deposit slips, and bank statements. We traced daily collections to the deposit date on the corresponding bank statement and noted the deposits were not made within one day of collection due to the low amount of cash collection activity at the School.

Written documentation specifies that the entity has a formal process to reconcile cash collections to the general ledger and/or subsidiary ledgers, by revenue source and/or agency fund additions.

Non-Payroll Disbursements (excluding card purchases/payments, travel reimbursements, and petty cash purchases)

- CLA obtained a listing of locations that process payments for the fiscal period and management's representation that the listing is complete. At this time there is only one disbursement location. CLA obtained management's representation that the listing or general ledger population is complete.
- CLA obtained a listing of those employees involved with non-payroll purchasing and payment functions and written policies and procedures relating to employee job duties and observed that job duties are properly segregated such that:
- At least two employees are involved in initiating a purchase request, approving a purchase, and placing an order/making the purchase.
- b) At least two employees are involved in processing and approving payments to vendors.
- c) The employee responsible for processing payments is prohibited from adding/modifying vendor files, unless another employee is responsible for periodically reviewing changes to vendor files.
- d) Either the employee/official responsible for signing checks mails the payment or gives the signed checks to an employee to mail who is not responsible for processing payments.

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INDEPENDENT ACCOUNTANT'S REPORT ON APPLYING AGREED-UPON PROCEDURES

- 10. Using non-payroll disbursement transaction population from #8 above, CLA randomly selected 25 disbursements, non-payroll disbursement transaction population (excluding cards and travel reimbursements) and obtained supporting documentation (e.g. purchase requisitions, system screens/logs) for each transaction and verified that the supporting documentation for each transaction demonstrated that:
 - a) Observed that the disbursement matched the related original invoice/billing statement.
 - b) Observed that the disbursement documentation included evidence (e.g., initial/date, electronic logging) of segregation of duties tested under #9, as applicable.

Results: At least two employees are involved in initiating a purchase request, approving a purchase, and placing an order/making the purchase. At least two employees are involved in processing and approving payments to vendors. The employee responsible for processing payments is prohibited from adding/modifying vendor files, unless another employee is responsible for periodically reviewing changes to vendor files. The employee/official responsible for signing checks mails the payment or gives the signed checks to an employee to mail who is not responsible for processing payments.

The sample purchases were initiated using a requisition/purchase order system that separates initiation from approval functions in the same manner as a requisition/purchase order system without exception. Sampled purchase orders, or an electronic equivalent, were approved by a person who did not initiate the purchase. Payments for purchases were not processed without an approved requisition and/or purchase order, or electronic equivalent, a receiving report showing receipt of goods purchased, or electronic equivalent; and an approved invoice, as applicable.

Credit Cards/Debit Cards/Fuel Cards/P-Cards

11. CLA obtained from management a listing of all active credit cards, bank debit cards, fuel cards, and P-cards (cards), including the card numbers and the names of the persons who maintained possession of the cards. CLA obtained management's representation that the listing is complete.

Results: The School did not use any credit cards, bank debit cards, fuel cards, and P-cards (cards) during the year.

- 12. Using the listing prepared by management, CLA randomly selected 5 cards (or all cards if less than 5) that were used during the fiscal period. CLA randomly selected one monthly statement or combined statement for each card (for a debit card, randomly select one monthly bank statement), obtain supporting documentation, and:
 - Observed there was evidence that the monthly statement or combined statement and supporting documentation was reviewed and approved, in writing, by someone other than the authorized card holder.
 - b) Observed no finance charges and/or late fees were assessed on the selected statements.

Results: N/A - The School did not use any credit cards, bank debit cards, fuel cards, and P-cards (cards) during the year.

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- 13. Using the monthly statements or combined statements selected under #12 above, CLA obtained supporting documentation for all transactions for each of the cards selected.
 - a) For each transaction, CLA observed the transaction was supported by:
 - > An original itemized receipt (i.e., identifies precisely what was purchased)
 - Documentation of the business/public purpose. For meal charges, there should also be documentation of the individuals participating.
 - b) For each transaction, CLA compared the transaction's detail (nature of purchase, dollar amount of purchase, supporting documentation) to the entity's written purchasing/disbursement policies and the Louisiana Public Bid Law (i.e. transaction is a large or recurring purchase requiring the solicitation of bids or quotes) without exception.
 - c) For each transaction, CLA compared the entity's documentation of the business/public purpose to the requirements of Article 7, Section 14 of the Louisiana Constitution, which prohibits the loan, pledge, or donation of funds, credit, property, or things of value without exception.

Results: N/A - The School did not use any credit cards, bank debit cards, fuel cards, and P-cards (cards) during the year.

Travel and Travel-Related Expense Reimbursements (excluding card transactions)

- 14. CLA obtained the general ledger and sorted/filtered for travel reimbursements. CLA obtained management's representation that the listing or general ledger is complete. CLA randomly selected 5 reimbursements, obtain the related expense reimbursement forms/prepaid expense documentation of each selected reimbursement, as well as the supporting documentation. For each of the 5 reimbursements selected:
 - a) If reimbursed using a per diem, agree the reimbursement rate to those rates established either by the State of Louisiana or the U.S. General Services Administration (www.gsa.gov).
 - b) If reimbursed using actual costs, observe that the reimbursement is supported by an original itemized receipt that identifies precisely what was purchased.
 - c) Observe that each reimbursement is supported by documentation of the business/public purpose (for meal charges, observe that the documentation includes the names of those individuals participating) and other documentation required by written policy (procedure #1h).
 - Observe that each reimbursement was reviewed and approved, in writing, by someone other than the person receiving reimbursement.

Results: CLA obtained the general ledger and sorted/filtered for travel reimbursements. CLA obtained management's representation that the listing or general ledger is complete. CLA obtained the entity's written policies related to travel and expense reimbursements and compared the amounts in the policies to the per diem and mileage rates established by the U.S. General Services Administration (www.gss.gov) without exception.

INDEPENDENT ACCOUNTANT'S REPORT ON APPLYING AGREED-UPON PROCEDURES

CLA observed that each expense is supported by:

- > An original itemized receipt that identifies precisely what was purchased.
- Documentation of the business/public purpose and for meal charges, that there was also documentation of the individuals participating.

CLA compared the entity's documentation of the business/public purpose to the requirements of Article 7, Section 14 of the Louisiana Constitution, which prohibits the loan, pledge, or donation of funds, credit, property, or things of value, and report any exceptions (e.g. hotel stays that extend beyond conference periods or payment for the travel expenses of a spouse) without exception.

CLA observed each expense and related documentation was reviewed and approved, in writing, by someone other than the person receiving reimbursement.

Contracts

15. CLA obtained a listing of all contracts in effect during the fiscal period or, alternately, obtain the general ledger and sort/filter for contract payments. CLA obtained management's representation that the listing or general ledger is complete.

Using the listing above, CLA randomly selected the five contract "vendors" (excluding the practitioner's contract) and:

- a) Observed that the contract was bid in accordance with the Louisiana Public Bid Law (e.g., solicited quotes or bids, advertised), if required by law.
- b) CLA obtained/reviewed contract documentation and board minutes and observed there was documentation of board approval, if required by policy or law (e.g. Lawrason Act or Home Rule Charter).
- c) If the contract was amended (e.g. change order), observed that the original contract terms provided for such an amendment.
- d) Randomly selected one payment from the fiscal period for each of the 5 contracts, obtained the supporting invoice, agreed the invoice to the contract terms, and observed that the invoice and related payment agreed to the terms and conditions of the contract.

Results: CLA obtained the general ledger and sorted/filtered for contract payments. CLA obtained management's representation that the general ledger is complete.

For the contracts selected (solicited quotes as a best practice was used and no contracts were amended), CLA observed if there is a formal/written board approved contract that supports the services arrangement, and that no contracts were subject to the Louisiana Public Bid Law or Procurement Code.

For the contracts selected obtained the supporting invoice, agreed the invoice to the contract terms, and observed that the invoice and related payment agreed to the terms and conditions of the contract.

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Payroll and Personnel

16. CLA obtained a listing of employees (and elected officials, if applicable) with their related salaries, and obtained management's representation that the listing was complete. CLA randomly selected five employees/officials, obtained their personnel files, and:

- a) CLA reviewed compensation paid to each employee during the fiscal period and observed payments were made in strict accordance with the terms and conditions of the employment contract or pay rate structure.
- b) CLA reviewed changes made to hourly pay rates/salaries during the fiscal period and observed those changes were approved in writing and in accordance with written policy.

Results: CLA obtained a list of employees (and elected officials, if applicable) with their related salaries, and obtained management's representation that the listing was complete. CLA randomly selected five employees/officials, obtained their personnel files, and noted that compensation paid to each employee during the fiscal period were made in strict accordance with the terms and conditions of the employment contract or pay rate structure. CLA noted that no changes were made to hourly pay rates/salaries during the fiscal period.

- 17. CLA obtained attendance and leave records and randomly selected one pay period in which leave has been taken by at least one employee. Within that pay period, CLA randomly selected one-third of employees/officials and:
 - Observed all selected employees/officials documented their daily attendance and leave (e.g., vacation, sick, compensatory).
 - b) Report whether there is written documentation that supervisors approved, electronically or in writing, the attendance and leave of the selected employees/officials.
- c) Report whether there is written documentation that the entity maintained written leave records (e.g., hours earned, hours used, and balance available) on those selected employees/officials that earn leave.

Results: CLA obtained attendance and leave records and noted that there were no employees that went on leave during the year.

16. CLA obtained from management a list of those employees/officials that terminated during the fiscal period and management's representation that the list is complete. CLA randomly selected two employees/officials, obtained related documentation of the hours and pay rates used in management's termination payment calculations, agreed the hours to the employee/officials' cumulate leave records, and agree the pay rates to the employee/officials' personnel files.

Results: CLA obtained a list of those employees/officials that terminated during the fiscal period and management's representation that the list is complete. CLA observed that were no employees terminated during the fiscal period. Employees or almost all teachers on annual contracts.

19. CLA obtained supporting documentation (e.g. cancelled checks, EFT documentation) relating to payroll taxes and retirement contributions during the fiscal period. CLA observed that the employee and employer portions of payroll taxes and retirement contributions, as well as the required reporting forms, were submitted to the applicable agencies by the required deadlines.

INDEPENDENT ACCOUNTANT'S REPORT ON APPLYING AGREED-UPON PROCEDURES

Results: CLA obtained supporting documentation (e.g. cancelled checks, EFT documentation) relating to payroll taxes and retirement contributions during the fiscal period and observed that the employee and employer portions of payroll taxes and retirement contributions, as well as the required reporting forms, were submitted to the applicable agencies by the required deadlines.

Ethics

We did not perform procedure 20 as this is not applicable to the not-for-profit charter school.

Other

 CLA inquired of management and determined the entity had no any misappropriations of public funds or assets.

Results: CLA inquired of management and determined the entity had no any misappropriations of public funds or assets.

 CLA observed that the entity has posted on its premises and website, the notice required by R.S. 24:523.1.

Results: CLA inquired of management and determined the entity had no any misappropriations of public funds or assets.

This agreed-upon procedures engagement was performed in accordance with attestation standards established by the American Institute of Certified Public Accountants and applicable standards of Government Auditing Standards. CLA was not engaged to and did not conduct an examination or review, the objective of which would be the expression of an opinion or conclusion, respectively, on management's assertions. Accordingly, we do not express such an opinion. Had we performed additional procedures, other matters might have come to our attention that would have been reported to you.

The report is intended solely for the use of management of the School, the Louisiana Department of Education, the Louisiana Legislature, and the Legislative Auditor, State of Louisiana, and should not be used by those who have not agreed to the procedures and taken responsibility for the sufficiency of the procedures for their purposes. Under Louisiana Revised Statute 24:513, this report is distributed by the Legislative Auditor as a public document.

Clifton Larson Allen LLP

CliftonLarsonAllen LLP Glendora CA September 12, 2017

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Payroll and Personnel

- 16. CLA obtained a listing of employees (and elected officials, if applicable) with their related salaries, and obtained management's representation that the listing was complete. CLA randomly selected five employees/officials, obtained their personnel files, and:
 - a) CLA reviewed compensation paid to each employee during the fiscal period and observed payments were made in strict accordance with the terms and conditions of the employment contract or pay rate structure.
- b) CLA reviewed changes made to hourly pay rates/salaries during the fiscal period and observed those changes were approved in writing and in accordance with written policy.

Results: CLA obtained a list of employees (and elected officials, if applicable) with their related salaries, and obtained management's representation that the listing was complete. CLA randomly selected five employees/officials, obtained their personnel files, and noted that compensation paid to each employee during the fiscal period were made in strict accordance with the terms and conditions of the employment contract or pay rate structure. CLA noted that no changes were made to hourly pay rates/salaries during the fiscal period.

- 17. CLA obtained attendance and leave records and randomly selected one pay period in which leave has been taken by at least one employee. Within that pay period, CLA randomly selected one-third of employees/officials and:
 - a) Observed all selected employees/officials documented their daily attendance and leave (e.g., vacation, sick, compensatory).
 - b) Report whether there is written documentation that supervisors approved, electronically or in writing, the attendance and leave of the selected employees/officials.
 - c) Report whether there is written documentation that the entity maintained written leave records (e.g., hours earned, hours used, and balance available) on those selected employees/officials that earn leave.

Results: CLA obtained attendance and leave records and noted that there were no employees that went on leave during the year.

18. CLA obtained from management a list of those employees/officials that terminated during the fiscal period and management's representation that the list is complete. CLA randomly selected two employees/officials, obtained related documentation of the hours and pay rates used in management's termination payment calculations, agreed the hours to the employee/officials' cumulate leave records, and agree the pay rates to the employee/officials' authorized pay rates in the employee/officials' personnel files.

Results: CLA obtained a list of those employees/officials that terminated during the fiscal period and management's representation that the list is complete. CLA observed that were no employees terminated during the fiscal period. Employees or almost all teachers on annual contracts.

19. CLA obtained supporting documentation (e.g. cancelled checks, EFT documentation) relating to payroll taxes and retirement contributions during the fiscal period. CLA observed that the employee and employer portions of payroll taxes and retirement contributions, as well as the required reporting forms, were submitted to the applicable agencies by the required deadlines.

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INDEPENDENT ACCOUNTANT'S REPORT ON APPLYING AGREED-UPON PROCEDURES

Results: CLA obtained supporting documentation (e.g. cancelled checks, EFT documentation) relating to payroll taxes and retirement contributions during the fiscal period and observed that the employee and employer portions of payroll taxes and retirement contributions, as well as the required reporting forms, were submitted to the applicable agencies by the required deadlines.

Ethics

We did not perform procedure 20 as this is not applicable to the not-for-profit charter school.

Other

Results: CLA inquired of management and determined the entity had no any misappropriations of public funds or assets.

 CLA observed that the entity has posted on its premises and website, the notice required by R.S. 24:523.1.

Results: CLA inquired of management and determined the entity had no any misappropriations of public funds or assets.

This agreed-upon procedures engagement was performed in accordance with attestation standards established by the American Institute of Certified Public Accountants and applicable standards of Government Auditing Standards. CLA was not engaged to and did not conduct an examination or review, the objective of which would be the expression of an opinion or conclusion, respectively, on management's assertions. Accordingly, we do not express such an opinion. Had we performed additional procedures, other matters might have come to our attention that would have been reported to you.

The report is intended solely for the use of management of the School, the Louisiana Department of Education, the Louisiana Legislature, and the Legislative Auditor, State of Louisiana, and should not be used by those who have not agreed to the procedures and taken responsibility for the sufficiency of the procedures for their purposes. Under Louisiana Revised Statute 24:513, this report is distributed by the Legislative Auditor as a public document.

Clifton Larson Allen LLP

CliftonLarsonAllen LLP Glendora CA September 12, 2017

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CLA inquired of management and determined the entity had no any misappropriations of public funds or assets.

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ROOTED SCHOOL

FINANCIAL STATEMENTS AND SUPPLEMENTARY INFORMATION

YEAR ENDED JUNE 30, 2019



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INDEPENDENT AUDITORS' REPORT

Board of Directors Rooted School New Orleans, Louisiana

Report on the Financial Statements

We have audited the accompanying financial statements of Rooted School (the School), a nonprofit public benefit corporation, which comprise the statement of financial position as of June 30, 2019, and the related statements of activities, cash flows, and functional expenses for the year then ended, and the related notes to the financial statements.

Management's Responsibility for the Financial Statements

Management is responsible for the preparation and fair presentation of these financial statements in accordance with accounting principles generally accepted in the United States of America; this includes the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error.

Auditors' Responsibility

Our responsibility is to express an opinion on these financial statements based on our audit. We conducted our audit in accordance with auditing standards generally accepted in the United States of America and the standards applicable to financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States. Those standards require that we plan and perform the audit to obtain reasonable assurance about whether the financial statements are free of material misstatement.

An audit involves performing procedures to obtain audit evidence about the amounts and disclosures in the financial statements. The procedures selected depend on the auditors' judgment, including the assessment of the risks of material misstatement of the financial statements, whether due to fraud or error. In making those risk assessments, the auditor considers internal control relevant to the entity's preparation and fair presentation of the financial statements in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the entity's internal control. Accordingly, we express no such opinion. An audit also includes evaluating the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluating the overall presentation of the financial statements.

We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.



(1)

Board of Directors Rooted School

Opinion

In our opinion, the financial statements referred to on page one present fairly, in all material respects, the financial position of the School as of June 30, 2019, and the changes in its net assets and its cash flows for the year then ended in accordance with accounting principles generally accepted in the United States of America.

Other Matters

Other Information

Our audit was conducted for the purpose of forming an opinion on the School's financial statements as a whole. The accompanying schedule of compensation, benefits, and other payments to the agency head is presented for purposes of additional analysis and are not a required part of the basic financial statements. Such information is the responsibility of management and was derived from and relates directly to the underlying accounting and other records used to prepare the financial statements. The information has been subjected to the auditing procedures applied in the audit of the financial statements and certain additional procedures, including comparing and reconciling such information directly to the underlying accounting and other records used to prepare the financial statements or to the financial statements themselves, and other additional procedures in accordance with auditing standards generally accepted in the United States of America. In our opinion, the information is fairly stated, in all material respects, in relation to the financial statements as a whole.

The schedules required by Louisiana State Law, included as Schedules 1 through 2, are not a required part of the basic financial statements, but are supplementary information required by Louisiana State Law. Such information is the responsibility of management and was derived from and relates directly to the underlying accounting and other records used to prepare the combining financial statements. We have applied certain limited procedures, which are described in the Independent Accountants' Report on Applying Agreed-Upon Procedures. However, we did not audit this information and, accordingly, express no opinion on it.

Other Reporting Required by Government Auditing Standards

In accordance with Government Auditing Standards, we have also issued a report dated September 27, 2019 on our consideration of the School's internal control over financial reporting and on our tests of its compliance with certain provisions of laws, regulations, contracts, and grant agreements and other matters. The purpose of that report is to describe the scope of our testing of internal control over financial reporting and compliance and the results of that testing, and not to provide an opinion on the internal control over financial reporting or on compliance. That report is an integral part of an audit performed in accordance with Government Auditing Standards in considering the School's internal control over financial reporting and compliance.

Clifton Larson Allen LLP

CliftonLarsonAllen LLP

Glendora, California September 27, 2019

(2)

ROOTED SCHOOL STATEMENT OF FINANCIAL POSITION JUNE 30, 2019

ASSETS

CURRENT ASSETS		
Cash and Cash Equivalents	S	176,764
Accounts Receivable - Federal and State		64,356
Accounts Receivable - Other		7,863
Total Current Assets		248,983
Total Assets	S	248,983
LIABILITIES AND NET ASSETS		
CURRENT LIABILITIES		
Accounts Payable and Accrued Liabilities	S	105,422
Total Current Liabilities		105,422
NET ASSETS		
Without Donor Restriction	s	143,561
Total Net Assets		143,561
Total Liabilities and Net Assets	S	248,983

ROOTED SCHOOL STATEMENT OF ACTIVITIES YEAR ENDED JUNE 30, 2019

REVENUES, WITHOUT DONOR RESTRICTION		
State and Local Public School Funding	\$	1,052,898
Other State Revenue		100,364
Federal Grants		99,318
Donations		626,642
Other Income		121,177
Total Revenues	20	2,000,399
EXPENSES		
Program Services		1,587,577
Management and General		278,443
Fundraising		191,141
Total Expenses	_	2,057,161
CHANGE IN NET ASSETS		(56,762)
Net Assets Without Donor Restriction - Beginning of Year	_	200,323
NET ASSETS WITHOUT DONOR RESTRICTION - END OF YEAR	S	143,561

(3)

See accompanying Notes to Financial Statements.

(4)

ROOTED SCHOOL STATEMENT OF CASH FLOWS YEAR ENDED JUNE 30, 2019

e	(56,762)
3	(30,702)
	(11,535)
	80,142
	11,845
	11,845
	164,919
S	176,764
	\$

ROOTED SCHOOL STATEMENT OF FUNCTIONAL EXPENSES YEAR ENDED JUNE 30, 2019

		Program Services		Management and General		Fundraising		Total Expenses	
Salaries and Wages	s	659,433	\$	78,069	\$	172,500	s	910,002	
Pension Expense		22,636		2,540		5,333		30,509	
Other Employee Benefits		73,569		11,743		6,848		92,160	
Payroll Taxes		48,930		16,022		2,460		67,412	
Legal Expenses		-		7.657				7,657	
Instructional Materials		119,235				-		119,235	
Other Fees for Services		388,742		30,546		4,000		423,288	
Advertising and Promotion Expenses		-		108		10 a		108	
Office Expenses				10,517				10,517	
Occupancy Expenses		211,689						211,689	
Insurance Expense				14,370				14,370	
Other Expenses		18,123		76,131		-		94,254	
Total	s	1,587,577	\$	278,443	\$	191,141	\$	2,057,161	

See accompanying Notes to Financial Statements.

(5)

See accompanying Notes to Financial Statements.

(6)

ROOTED SCHOOL NOTES TO FINANCIAL STATEMENTS JUNE 30, 2019

NOTE 1 SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES

Nature of Activities

The Rooted School (the School) was created as a nonprofit corporation under the laws of the State of Louisiana in 2014. The School applied to the Orleans Parish School Board to operate a Type I charter school. The Orleans Parish School Board approved the charter of the School for a period of five years commencing on July 1, 2017 and ending on June 30, 2022. The school serves eligible students in ninth through twelfth grade.

The School received approximately 63% of its total revenues from federal and state grantors.

Basis of Accounting

The financial statements have been prepared on the accrual method of accounting and accordingly reflect all significant receivables and liabilities.

Basis of Presentation

The accompanying financial statements have been prepared in conformity with accounting principles generally accepted in the United States of America as prescribed by the Financial Accounting Standards Board.

Use of Estimates

The preparation of financial statements in conformity with accounting principles generally accepted in the United States of America requires management to make estimates and assumptions that affect the reported amounts of assets, liabilities, and disclosures. Accordingly, actual results could differ from those estimates.

Functional Allocation of Expenses

Costs of providing the School's programs and other activities have been presented in the statement of functional expenses. During the year, such costs are accumulated into separate groupings as either direct or indirect. Indirect or shared costs are allocated among program and support services by a method that best measures the relative degree of benefit.

Cash and Cash Equivalents

The School defines its cash and cash equivalents to include only cash on hand, demand deposits, and liquid investments with original maturities of three months or less.

ROOTED SCHOOL NOTES TO FINANCIAL STATEMENTS JUNE 30, 2019

NOTE 1 SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (CONTINUED)

Net Asset Classes

Net assets, revenues, gains, and losses are classified based on the existence or absence of donor or grantor imposed restrictions. Accordingly, net assets and changes therein are classified and reported as follows:

Net Assets Without Donor Restrictions – Net assets available for use in general operations and not subject to donor (or certain grantor) restrictions. The governing board has designated, from net assets without donor restrictions, net assets for an operating reserve and board-designated endowment.

Net Assets With Donor Restrictions – Net assets subject to donor- (or certain grantor-) imposed restrictions. Some donor-imposed restrictions are temporary in nature, such as those that will be met by the passage of time or other events specified by the donor. Other donor-imposed restrictions are perpetual in nature, where the donor stipulates that resources be maintained in perpetuity. Donor-imposed restrictions are released when a restriction expires, that is, when the stipulated time has elapsed, when the stipulated purpose for which the resource was restricted has been fulfilled, or both.

Accounts Receivable

Accounts receivable primarily represent amounts due from federal and state governments as of June 30, 2019. Management believes that all receivables are fully collectible, therefore no provisions for uncollectible accounts were recorded.

Compensated Absences

The School does not allow employees to carryover unused vacation. Accordingly, there were no accumulated compensated absence benefits at June 30, 2019.

Revenue

The School's primary sources of funding are through the State Public School Fund and federal grants, as well as private donations. Federal grants are recorded on a cost reimbursement basis. An accrual is made when eligible expenses are incurred.

Contributions

All contributions are considered to be available for use unless specifically restricted by the donor. Amounts received that are restricted to specific use or future periods are reported as contributions with donor restrictions. Restricted contributions that are received and released in the same period are reported as promises to give without donor restrictions. Unconditional promises to give expected to be received in one year or less are recorded at. Unconditional value. Unconditional promises to give expected to be received in more than one year are recorded at fair value at the date of the promise. Conditional promises to give are not recognized until they become unconditional, that is, when the conditions on which they depend are substantially met.

(7)

(8)

ROOTED SCHOOL NOTES TO FINANCIAL STATEMENTS JUNE 30, 2019

NOTE 1 SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (CONTINUED)

Income Taxes

The School is a nonprofit entity exempt from the payment of income taxes under Internal Revenue Code Section 501(c)(3). Accordingly, no provision has been made for income taxes. Management has determined that all income tax positions are more likely than not of being sustained upon potential audit or examination; therefore, no disclosures of uncertain income tax positions are required. The School is subject to income tax on net income that is derived from business activities that are unrelated to the exempt purposes. The School files and exempt School return and applicable unrelated business income tax return in the U.S. federal jurisdiction.

Change in Accounting Principle

On August 18, 2016, FASB issued Accounting Standards Update (ASU) 2016-14, Not-for-Profit Entities (Topic 958) – Presentation of Financial Statements of Not-for-Profit Entities, The update addresses the complexity and understandability of net asset classification, deficiencies in information about liquidity and availability of resources, and the lack of consistency in the type of information provided about expenses and investment return. The School has implemented ASU 2016-14 and have adjusted the presentation in these financial statements accordingly.

Evaluation of Subsequent Events

The School has evaluated subsequent events through September 27, 2019, the date these financial statements were available to be issued.

NOTE 2 LIQUIDITY AND AVAILABILITY

Financial assets available for general expenditure are those without donor or other restrictions limiting their use within one year of the statement of financial position date. Financial assets available for general expenditures comprise cash and cash equivalents and grants receivable for the total amount of \$248,983.

NOTE 3 CONCENTRATION OF CREDIT RISK

The School maintains cash balances held in banks and revolving funds which are insured up to \$250,000 by the Federal Depository Insurance Corporation (FDIC). At times, cash in these accounts exceeds the insured amounts. The School has not experienced any losses in such accounts and believes it is not exposed to any significant credit risk on its cash and cash equivalents.

ROOTED SCHOOL NOTES TO FINANCIAL STATEMENTS JUNE 30, 2019

NOTE 4 EMPLOYEE RETIREMENT

Defined Contribution Plan

The School offers an Internal Revenue Code Section 401(k) retirement plan to each of its qualifying employees. Employer and employee contributions are used to purchase annuity contracts for each participant employee. Employer matching contributions are made as a percentage of elective deferrals for each employee who is eligible for employer contributions. Additionally, the employer may elect to make a discretionary contribution for each qualifying employee for each plan year. The amount of employer contributions used to purchase annuity contracts for the year ended June 30, 2019 was \$30,509.

NOTE 5 CONTINGENCIES

The School has received state and federal funds for specific purposes that are subject to review and audit by the grantor agencies. Although such audits could generate disallowances under terms of the grants, it is believed that any required reimbursement would not be material.

NOTE 6 FUNCTIONALIZED EXPENSES

The financial statements report certain categories of expenses that are attributed to more than one program or supporting function(s). Therefore, expenses require allocation on a reasonable basis that is consistently applied. The expenses that are allocated include salaries and wages, pension expense, other employee benefits, payroll taxes, other fees for services, office expenses, printing and postage, information technology, and other expenses, which are allocated on the basis of estimates of time and effort.

(9)

(10)



INDEPENDENT AUDITOR'S REPORT ON INTERNAL CONTROL OVER FINANCIAL REPORTING AND ON COMPLIANCE AND OTHER MATTERS BASED ON AN AUDIT OF FINANCIAL STATEMENTS PERFORMED IN ACCORDANCE WITH GOVERNMENT AUDITING STANDARDS

Board of Directors Rooted School New Orleans, Louisiana

We have audited, in accordance with the auditing standards generally accepted in the United States of America and the standards applicable to financial audits contained in *Government Auditing Standards* issued by the Comptroller General of the United States, the financial statements of Rooted School (the School), a nonprofit public benefit corporation, which comprise the statement of financial position as of June 30, 2019, and the related statements of activities, cash flows, and functional expenses for the year then ended, and the related notes to the financial statements, and have issued our report thereon dated September 27, 2019.

Internal Control Over Financial Reporting

In planning and performing our audit of the financial statements, we considered the School's internal control over financial reporting (internal control) to determine the audit procedures that are appropriate in the circumstances for the purpose of expressing our opinion on the financial statements, but not for the purpose of expressing an opinion on the effectiveness of the School's internal control. Accordingly, we do not express an opinion on the effectiveness of the School's internal control.

A deficiency in internal control exists when the design or operation of a control does not allow management or employees, in the normal course of performing their assigned functions, to prevent or detect and correct misstatements on a timely basis. A *material weakness* is a deficiency or a combination of deficiencies in internal control such that there is a reasonable possibility that a material misstatement of the financial statements will not be prevented or detected and corrected on a timely basis. A *significant deficiency* is a deficiency, or a combination of deficiencies, in internal control that is less severe than a material weakness, yet important enough to merit attention by those charged with governance.

Our consideration of internal control was for the limited purpose described in the first paragraph of this section and was not designed to identify all deficiencies in internal control that might be material weaknesses or significant deficiencies. Given these limitations, during our audit we did not identify any deficiencies in internal control that we consider to be material weaknesses. However, material weaknesses may exist that have not been identified.



(11)

Board of Directors Rooted School

Compliance and Other Matters

As part of obtaining reasonable assurance about whether the School's financial statements are free from material misstatement, we performed tests of its compliance with certain provisions of laws, regulations, contracts, and grant agreements, noncompliance with which could have a direct and material effect on the determination of financial statement amounts. However, providing an opinion on compliance with those provisions was not an objective of our audit, and accordingly, we do not express such an opinion. The results of our tests disclosed no instances of noncompliance or other matters that are required to be reported under *Government Auditing Standards*.

Purpose of this Report

The purpose of this report is solely to describe the scope of our testing of internal control and compliance and the results of that testing, and not to provide an opinion on the effectiveness of the entity's internal control or on compliance. This report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering the entity's internal control and compliance. Accordingly, this communication is not suitable for any other purpose.

Clifton larson Allen LLP

CliftonLarsonAllen LLP

Glendora, California September 27, 2019

(12)

ROOTED SCHOOL SCHEDULE OF FINDINGS YEAR ENDED JUNE 30, 2019 ROOTED SCHOOL SCHEDULE OF PRIOR YEAR FINDINGS YEAR ENDED JUNE 30, 2019

(14)

There were no findings for the year ended June 30, 2019.

There were no findings for the year ended June 30, 2018.

(13)

ROOTED SCHOOL SCHEDULE OF COMPENSATION, BENEFITS, AND OTHER PAYMENTS TO THE AGENCY HEAD YEAR ENDED JUNE 30, 2019

Purpose	Ar	nount
Salary	S	100,000
Benefits - Employer Portion of Retirement		4,750
Benefits - Employer Portion of Medical/Dental/Vision		4,409
Travel		-
Cell Phone Reimbursement		-
Reimbursements		-
Conferences		-
Benefits - FICA Medicare		11,191
Other Compensation-Security		· -
Community Relations		-
Professional Development		-
Total	S	120,350

SCHEDULES REQUIRED BY LOUISIANA STATE LAW

(R.S. 24:514 - PERFORMANCE AND STATISTICAL DATA)

(15)



Board of Directors Rooted School New Orleans, Louisiana

We have performed the procedures enumerated below, which were agreed to by Rooted School (the School); the Louisiana Department of Education, and the Louisiana Legislative Auditor (the specified parties), on the performance and statistical data accompanying the annual financial statements of the School for the fiscal year ended June 30, 2019; and to determine whether the specified schedules are free of obvious errors and omissions as provided by the Board of Elementary and Secondary Education (BESE) Bulletin 126, in compliance with Louisiana Revised Statute 24:514 I. Management of the School is responsible for its performance and statistical data. The sufficiency of these procedures is solely the responsibility of the specified parties. Consequently, we make no representation regarding the sufficiency of the procedures enumerated below either for the purpose for which this report has been requested or for any other purpose.

Our procedures and findings relate to the accompanying schedules of supplemental information and are as follows:

General Fund Instructional and Support Expenditures and Certain Local Revenue Sources (Schedule 1)

- We selected a random sample of 25 transactions and reviewed supporting documentation to determine if the sampled expenditures/revenues are classified correctly, based on description and nature of the revenue/expense, and are reported in the proper amounts for each of the following amounts reported on the schedule:
 - · Total General Fund Instructional Expenditures,
 - · Total General Fund Equipment Expenditures,
 - Total Local Taxation Revenue,
 - Total Local Earnings on Investment in Real Property.
 - · Total State Revenue in Lieu of Taxes,
 - Nonpublic Textbook Revenue, and
 - Nonpublic Transportation Revenue

Findings:

None.



(15)

Board of Directors Rooted School

Class Size Characteristics (Schedule 2)

We obtained a list of classes by school, school type, and class size as reported on the schedule. We then traced all classes to the October 1st roll books for those classes and determined if the class was accurately classified on the schedule.

Findings:

None.

Education Levels of Public School Staff (NO SCHEDULE)

3. We obtained October 1st PEP data submitted to the Department of Education (or equivalent listing prepared by management), including full-time teachers, principals, and assistant principals by classification, as well as their level of education and experience, and obtained management's representation that the data/listing was complete. We then selected a sample of 25 individuals, traced to each individual's personnel file, and observed that each individual's education level and experience was property classified on the PEP data or equivalent listing prepared by management.

Findings: None.

None.

This agreed-upon procedures engagement was performed in accordance with attestation standards established by the American Institute of Certified Public Accountants, and the standards applicable to attestation engagements contained in *Government Auditing Standards*, issued by the United States Comptroller General. We were not engaged to and did not conduct an examination or review, the objective of which would be the expression of an opinion or conclusion, respectively, on the performance and statistical data. Accordingly, we do not express such an opinion or conclusion. Had we performed additional procedures, other matters might have come to our attention that would have been reported to you.

The purpose of this report is solely to describe the scope of testing performed on the performance and statistical data accompanying the annual financial statements of the (City or Parish School Board or Charter School), as required by Louisiana Revised Statue 24:514.1, and the result of that testing, and not to provide an opinion on control or compliance. Accordingly, this report is not suitable for any other purpose. Under Louisiana Revised Statue 24:513, this report is distributed by the Louisiana Legislative Auditor as a public document.

Clifton Larson Allen LLP

CliftonLarsonAllen LLP

Glendora, California September 27, 2019

(16)

ROOTED SCHOOL GENERAL FUND INSTRUCTIONAL AND SUPPORT EXPENDITURES AND CERTAIN LOCAL REVENUE SOURCES SCHEDULE 1 YEAR ENDED JUNE 30, 2019 (SEE INDEPENDENT ACCOUNTANTS' REPORT ON AGREED-UPON PROCEDURES.)

General Fund Instructional and Equipment Expenditures	Column A	Column B		
General Fund Instructional Expenditures:				
Teacher and Student Interaction Activities:				
Classroom Teacher Salaries	322,566			
Other Instructional Staff Activities	10,021			
Instructional Staff Employee Benefits	65,759			
Purchased Professional and Technical Services	82,891			
Instructional Materials and Supplies	105,178			
Instructional Equipment	4,059			
Total Teacher and Student Interaction Activities		\$	590,474	
Other Instructional Activities				
Pupil Support Services	235,062			
Less: Equipment for Pupil Support Services				
Net Pupil Support Services			235,062	
Instructional Staff Services	175,448			
Less: Equipment for Instructional Staff Services				
Net Instructional Staff Services	35		175,44	
School Administration	370,253			
Less: Equipment for School Administration				
Net School Administration	20 EX		370,25	
Total General Fund Instructional Expenditures				
(Total of Column B)		\$	1,371,23	
Total General Fund Equipment Expenditures				
(Object 730; Functional Series 1000-4000)		\$	4,05	
ocal Revenue Sources				
arnings on investments:				
Interest on Investments		\$		
Ther Revenue from Local Sources:				
Contributions and Donations			626,64;	
Revenue from Judgements/Court Orders				
fiscellaneous Revenues:				
Other Miscellaneous Revenues			121,17	
Total Revenues from Local Sources		5	747.819	

ROOTED SCHOOL CLASS-SIZE CHARACTERISTICS SCHEDULE 2 YEAR ENDED JUNE 30, 2019 (SEE INDEPENDENT ACCOUNTANTS' REPORT ON AGREED-UPON PROCEDURES.)

School Type	Class Size Range							
	1-20		21-26		27-33		34+	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Elementary			S					1
Elementary Activity Class			S		S	8 S		2
Middle High			2 C					
Middle High Activity Class			3 3	2 2		2		2
High	2	50%	2	50%				
High Activity Class		100000	3 × 9	1 - 10 - 10				
Combination								
Combination Activity Class			8 8	0				1

(17)

(18)



Board of Directors Rooted School New Orleans, LA

We have performed the procedures enumerated below, which were agreed to by Rooted School (the School) and the Louisiana Legislative Auditor (LLA), on the control and compliance (C/C) areas identified in the LLA's Statewide Agreed-Upon Procedures (SAUPs) for the fiscal period July 1, 2018 through June 30, 2019. The Entity's management is responsible for those C/C areas identified in the SAUPs. The sufficiency of these procedures is solely the responsibility of the specified users of this report. Consequently, we make no representation regarding the sufficiency of the procedures described below either for the purpose for which this report has been requested or for any other purpose.

This agreed-upon procedures engagement was conducted in accordance with attestation standards established by the American institute of Certified Public Accountants and applicable standards of *Government Auditing Standards*. The sufficiency of these procedures is solely the responsibility of the specified users of this report. Consequently, we make no representation regarding the sufficiency of the procedures described below either for the purpose for which this report has been requested or for any other purpose.

Rotation of Procedures

Entities that did not have exceptions in one or more of the twelve SAUP categories tested during Year 2 may exclude those categories from testing in Year 3.

Our procedures and findings are as follows:

Written Policies and Procedures

The prior year Statewide Agreed-Upon procedures had no exceptions in this area.

k. Disaster Recovery/Business Continuity, including (1) identification of critical data and frequency of data backups, (2) storage of backups in a separate physical location isolated from the network, (3) periodic testing/verification that backups can be restored, (4) use of antivirus software on all systems, (5) timely application of all available system and software patches/updates, and (6) identification of personnel, processes, and tools needed to recover operations after a critical event.

Results: The written policies and procedures addressed the above financial/business function.

Board or Finance Committee

We did not perform procedures for the period ended June 30, 2019. The prior year Statewide Agreed-Upon procedures had no exceptions in this area.

-1-

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Bank Reconciliations

We did not perform procedures for the period ended June 30, 2019. The prior year Statewide Agreed-Upon procedures had no exceptions in this area.

Collections

We did not perform procedures for the period ended June 30, 2019. The prior year Statewide Agreed-Upon procedures had no exceptions in this area.

Non-Payroll Disbursements (excluding card purchases/payments, travel reimbursements, and petty cash purchases)

We did not perform procedures for the period ended June 30, 2019. The prior year Statewide Agreed-Upon procedures had no exceptions in this area.

Credit Cards/Debit Cards/Fuel Cards/P-Cards

We did not perform procedures for the period ended June 30, 2019. The prior year Statewide Agreed-Upon procedures had no exceptions in this area.

Travel and Travel-Related Expense Reimbursements (excluding card transactions)

We did not perform procedures for the period ended June 30, 2019. The prior year Statewide Agreed-Upon procedures had no exceptions in this area.

Contracts

We did not perform procedures for the period ended June 30, 2019. The prior year Statewide Agreed-Upon procedures had no exceptions in this area.

Payroll and Personnel

We did not perform procedures for the period ended June 30, 2019. The prior year Statewide Agreed-Upon procedures had no exceptions in this area.

Ethics

We did not perform procedures for the period ended June 30, 2019. It is not applicable to this not-for-profit charter school.

Other

We did not perform procedures for the period ended June 30, 2019. The prior year Statewide Agreed-Upon procedures had no exceptions in this area.

-2-

INDEPENDENT ACCOUNTANT'S REPORT ON APPLYING AGREED-UPON PROCEDURES

This agreed-upon procedures engagement was performed in accordance with attestation standards established by the American Institute of Certified Public Accountants and applicable standards of Government Auditing Standards. CLA was not engaged to and did not conduct an examination or review, the objective of which would be the expression of an opinion or conclusion, respectively, on management's assertions. Accordingly, we do not express such an opinion. Had we performed additional procedures, other matters might have come to our attention that would have been reported to you.

The report is intended solely for the use of management of the School, the Louisiana Department of Education, the Louisiana Legislature, and the Legislative Auditor, State of Louisiana, and should not be used by those who have not agreed to the procedures and taken responsibility for the sufficiency of the procedures for their purposes. Under Louisiana Revised Statute 24:513, this report is distributed by the Legislative Auditor as a public document.

Clifton Larson Allen LLP

CliftonLarsonAllen LLP Glendora, California September 27, 2019





Board of Directors Rooted School New Orleans, Louisiana

We have audited the financial statements of Rooted School as of and for the year ended June 30, 2019, and have issued our report thereon dated September 27, 2019. We have previously communicated to you information about our responsibilities under auditing standards generally accepted in the United States of America, *Government Auditing Standards*, as well as certain information related to the planned scope and timing of our audit. Professional standards also require that we communicate to you the following information related to our audit.

Significant audit findings

Qualitative aspects of accounting practices

Accounting policies

Management is responsible for the selection and use of appropriate accounting policies. The significant accounting policies used by Rooted School are described in Note 1 to the financial statements.

As described in the footnotes, the entity changed accounting policies related to financial reporting by adopting Accounting Standards Update (ASU) 2016-14, Not-For-Profit Entities (Topic 958): Presentation of Financial Statements of Not-for-Profit Entities, in 2018. Accordingly, the accounting change has been retrospectively applied to prior periods presented as if the policy had always been used.

We noted no transactions entered into by the entity during the year for which there is a lack of authoritative guidance or consensus. All significant transactions have been recognized in the financial statements in the proper period.

Accounting estimates

Accounting estimates are an integral part of the consolidated financial statements prepared by management and are based on management's knowledge and experience about past and current events and assumptions about future events. Certain accounting estimates are particularly sensitive because of their significance to the consolidated financial statements and because of the possibility that future events affecting them may differ significantly from those expected. There were no accounting estimates deemed significant to the consolidated financial statements.

Financial statement disclosures

The financial statement disclosures are neutral, consistent, and clear.

Difficulties encountered in performing the audit

We encountered no significant difficulties in dealing with management in performing and completing our audit.



Board of Directors Rooted School Page 2

Uncorrected misstatements

Professional standards require us to accumulate all misstatements identified during the audit, other than those that are clearly trivial, and communicate them to the appropriate level of management. Management did not identify and we did not notify them of any uncorrected financial statement misstatements.

Corrected misstatements

Management did not identify and we did not notify them of any financial statement misstatements detected as a result of audit procedures.

Disagreements with management

For purposes of this letter, a disagreement with management is a financial accounting, reporting, or audiling matter, whether or not resolved to our satisfaction, that could be significant to the financial statements or the auditors' report. No such disagreements arose during our audit.

Management representations

We have requested certain representations from management that are included in the management representation letter dated September 27, 2019.

Management consultations with other independent accountants

In some cases, management may decide to consult with other accountants about auditing and accounting matters, similar to obtaining a "second opinion" on certain situations. If a consultation involves application of an accounting principle to the entity's financial statements or a determination of the type of auditors' opinion that may be expressed on those statements, our professional standards require the consulting accountant to check with us to determine that the consultant has all the relevant facts. To our knowledge, there were no such consultations with other accountants.

Significant issues discussed with management prior to engagement

We generally discuss a variety of matters, including the application of accounting principles and auditing standards, with management each year prior to engagement as the entity's auditors. However, these discussions occurred in the normal course of our professional relationship and our responses were not a condition to our engagement.

Other information in documents containing audited financial statements

With respect to the supplementary information accompanying the financial statements, on which we were engaged to report in relation to the financial statements as a whole, we made certain inquiries of management and evaluated the form, content, and methods of preparing the information to determine that the information complies with accounting principles generally accepted in the United States of America, the method of preparing it has not changed from the prior period or the reasons for such changes, and the information is appropriate and complete in relation to our audit of the financial statements. We compared and reconciled the supplementary information to the underlying accounting records used to prepare the financial statements or to the financial statements themselves. We have issued our report thereon dated September 27, 2019.

Board of Directors Rooted School Page 3

Other audit issues and upcoming new standards

Revenue from Contracts with Customers

In May 2014, the Financial Accounting Standards Board (FASB) issued Accounting Standards Update (ASU) No. 2014-09, Revenue from Contracts with Customers (Topic 606). This new revenue recognition standard affects all entities, including public, private, and not-for-profit, that have contracts with customers, except where there is other specific revenue recognition guidance issued by the FASB.

This new revenue recognition standard effectively eliminates the transaction specific and industryspecific revenue recognition guidance under current accounting principles generally accepted in the United States of America (U.S. GAAP) and replaces it with a principles-based approach for determining an entity's revenue recognition policies. The core principle of the revenue recognition standard is that an entity should recognize revenue to depict the transfer of goods or services to customers in an amount that reflects the consideration to which the entity expects to be entitled in exchange for those goods or services.

The effective date for this new revenue recognition standard for nonpublic entities is for annual reporting periods beginning after December 15, 2018.

This ASU has the potential to cause major changes in revenue recognition and have significant effects on an entity's financial statements. Based on the effective date and the adoption methods provided for in the standard, we strongly encourage management and governance of the entity to gain an understanding of the effect of Topic 606 by performing an assessment of the entity's various revenue streams, which may require a detailed review of customer contracts. The entity should be prepared to update policies and procedures. The assessment should be performed before making quantitative conclusions regarding the financial statement effect of Topic 606. We are available to assist you in developing your adoption and implementation plan over the course of the next few months.

This communication is intended solely for the information and use of the board of directors and management of Rooted School and is not intended to be, and should not be, used by anyone other than these specified parties.

* * *

Clifton Larson Allen LLP

CliftonLarsonAllen LLP

Glendora, California September 27, 2019

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ROOTED SCHOOL

FINANCIAL STATEMENTS AND SUPPLEMENTARY INFORMATION

YEAR ENDED JUNE 30, 2020



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INDEPENDENT AUDITORS' REPORT

Board of Directors Rooted School New Orleans, Louisiana

Report on the Financial Statements

We have audited the accompanying financial statements of Rooted School (the School), a nonprofit public benefit corporation, which comprise the statement of financial position as of June 30, 2020, and the related statements of activities, cash flows, and functional expenses for the year then ended, and the related notes to the financial statements.

Management's Responsibility for the Financial Statements

Management is responsible for the preparation and fair presentation of these financial statements in accordance with accounting principles generally accepted in the United States of America; this includes the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error.

Auditors' Responsibility

Our responsibility is to express an opinion on these financial statements based on our audit. We conducted our audit in accordance with auditing standards generally accepted in the United States of America and the standards applicable to financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States. Those standards require that we plan and perform the audit to obtain reasonable assurance about whether the financial statements are free of material misstatement.

An audit involves performing procedures to obtain audit evidence about the amounts and disclosures in the financial statements. The procedures selected depend on the auditors' judgment, including the assessment of the risks of material misstatement of the financial statements, whether due to fraud or error. In making those risk assessments, the auditor considers internal control relevant to the entity's preparation and fair presentation of the financial statements in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the entity's internal control. Accordingly, we express no such opinion. An audit also includes evaluating the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluating the overall presentation of the financial statements.

We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.



(1)

Board of Directors Rooted School

Opinion

In our opinion, the financial statements referred to on page one present fairly, in all material respects, the financial position of the School as of June 30, 2020, and the changes in its net assets and its cash flows for the year then ended in accordance with accounting principles generally accepted in the United States of America.

Other Matters

Supplementary Information

Our audit was conducted for the purpose of forming an opinion on the School's financial statements as a whole. The Expansion and Rooted School columns in the statements of financial position, activities, functional expenses, and cash flows as well as the accompanying schedule of compensation, benefits, and other payments to the agency head is presented for purposes of additional analysis and are not a required part of the basic financial statements. Such information is the responsibility of management and was derived from and relates directly to the underlying accounting and other records used to prepare the financial statements. The information has been subjected to the auditing procedures applied in the audit of the financial statements and certain additional procedures, including comparing and reconciling such information directly to the underlying accounting and other records used to prepare the financial statements or to the financial statements themselves, and other additional procedures in accordance with auditing standards generally accepted in the United States of America. In our opinion, the information is fairly stated, in all material respects, in relation to the financial statements as a whole.

The schedules required by Louisiana State Law, included as Schedules 1 through 2, are not a required part of the basic financial statements, but are supplementary information required by Louisiana State Law. Such information is the responsibility of management and was derived from and relates directly to the underlying accounting and other records used to prepare the combining financial statements. We have applied certain limited procedures, which are described in the Independent Accountants' Report on Applying Agreed-Upon Procedures. However, we did not audit this information and, accordingly, express no opinion on it.

Other Reporting Required by Government Auditing Standards

In accordance with Government Auditing Standards, we have also issued a report dated December 11, 2020 on our consideration of the School's internal control over financial reporting and on our tests of its compliance with certain provisions of laws, regulations, contracts, and grant agreements and other matters. The purpose of that report is to describe the scope of our testing of the internal control over financial reporting and compliance and the results of that testing, and not to provide an opinion on the effectiveness of the School's internal control over financial reporting or on compliance. That report is an integral part of an audit performed in accordance with Government Auditing Standards in considering the School's internal control over financial reporting and compliance.

Clifton Larson Allen LLP

CliftonLarsonAllen LLP

Glendora, California December 11, 2020

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ROOTED SCHOOL STATEMENT OF FINANCIAL POSITION JUNE 30, 2020

	E	cpansion	Roc	ted School	Total		
ASSETS							
CURRENT ASSETS							
Cash and Cash Equivalents	s	264,149	\$	212,125	\$	476,274	
Accounts Receivable		125,000		322,414		447,414	
Prepaid Expenses and Other Assets		-		14,034		14,034	
Total Current Assets		389,149	<u></u>	548,573		937,722	
Total Assets	s	389,149	\$	548,573	s	937,722	
LIABILITIES AND NET ASSETS							
CURRENT LIABILITIES							
Accounts Payable and Accrued Liabilities	s	-	\$	91,981	s	91,981	
Deferred Revenue				75,000		75,000	
Total Current Liabilities			_	166,981		166,981	
LONG-TERM LIABILITIES							
Loans Payable		-		345,495		345,495	
Total Long-Term Liabilities		-	-	345,495		345,495	
NET ASSETS							
Without Donor Restriction		247,436		(88,903)		158,533	
With Donor Restriction		141,713		125,000		266,713	
Total Net Assets	_	389,149	_	36,097	_	425,246	
Total Liabilities and Net Assets	\$	389,149	\$	548,573	\$	937,722	

ROOTED SCHOOL STATEMENT OF ACTIVITIES YEAR ENDED JUNE 30, 2020

	Expans	Expansion		oted School	Total		
REVENUES, WITHOUT DONOR RESTRICTION							
State and Local Public School Funding	\$	- 12	\$	1,893,065	\$	1,893,065	
Other State Revenue				36,150		36.150	
Federal Grants		- 11		248,395		248,395	
Donations	43	2,000		139,234		571,234	
Other Income				11,462		11,462	
Releases from Donor Restriction	2	0,287				20,287	
Total Revenues	45	2,287	_	2,328,306		2,780,593	
EXPENSES							
Program Services	2	9,378		1,933,932		1,963,310	
Management and General	24	1,148		501,838		742,986	
Fundraising	5	9,325		-		59,325	
Total Expenses	32	9,851	=	2,435,770	_	2,765,621	
CHANGE IN NET ASSETS WITHOUT DONOR RESTRICTION	12	2,436		(107,464)		14,972	
REVENUES, WITH DONOR RESTRICTION							
Donations	16	2,000		125,000		287,000	
Releases from Donor Restriction	(2	0,287)				(20,287)	
Total Revenues With Donor Restriction	14	1,713		125,000	_	266,713	
CHANGE IN NET ASSETS WITH DONOR RESTRICTION	14	1,713	_	125,000	_	266,713	
TOTAL CHANGE IN NET ASSETS	264,1		264,149 17,53		8 281,6		
Net Assets - Beginning of Year	12	5,000	_	18,561	_	143,561	
NET ASSETS - END OF YEAR	\$ 38	9,149	\$	36,097	\$	425,246	

See accompanying Notes to Financial Statements.	
	(3

See accompanying Notes to Financial Statements.

(4)

ROOTED SCHOOL STATEMENT OF CASH FLOWS YEAR ENDED JUNE 30, 2020

CASH FLOWS FROM OPERATING ACTIVITIES Change in Net Assets	\$	281,685
Adjustments to Reconcile Change in Net Assets to Net	5	201,000
Cash Flows Used by Operating Activities:		
Change in Operating Assets:		
Accounts Receivable		(375, 195)
Prepaid Expenses and Other Assets		(14,034)
Change in Operating Liabilities:		
Accounts Payable and Accrued Liabilities		(13,441)
Deferred Revenue		75,000
Net Cash Flows Used by Operating Activities		(45,985)
CASH FLOWS FROM FINANCING ACTIVITIES		
Proceeds for Debt Issuance		345,495
Net Cash Flows Provided by Financing Activities	_	345,495
NET CHANGE IN CASH AND CASH EQUIVALENTS		299,510
Cash and Cash Equivalents - Beginning of Year		176,764
CASH AND CASH EQUIVALENTS - END OF YEAR	\$	476,274

ROOTED SCHOOL STATEMENT OF FUNCTIONAL EXPENSES YEAR ENDED JUNE 30, 2020

	_	Program	Ma	nagement	tal			Total	
		Services		and General		ndraising	Expenses		
Salaries and Wages Pension Expense Other Employee Benefits Pavroll Taxes	5	937,775 29,547 103,533 69,445	s	244,597 6,501 13,535 21,234	s	54,745 1,060 2,253 1,267	\$	1,237,117 37,108 119,321 91,946	
egal Expenses Accounting Expenses Instructional Materials		-		37,229 41,051		-		37,229 41,051	
ther Fees for Services dvertising and Promotion Expenses		133,292 428,277 15,222		24,860 803		-		133,293 453,137 16.025	
Iffice Expenses Accupancy Expenses		224,890		13,828 1,365		:		13,820 226,255	
ravel Expenses Isurance Expense Xher Expenses		20,764		47,864 19,973 270,146		:		48,429 19,973 290,910	
Total	\$	1,963,310	\$	742.986	\$	59,325	\$	2,765,62	
				Expa	nsion				
	200	Program Services		nagement d General	Eu	ndraising	Total Expenses		
Interim and Minnes	_		-				_		
alaries and Wages lension Expense	\$	24,000 720	\$	18,505 870	\$	54,745 1,060	\$	97,25	
ther Employee Benefits		2.334		0/0		2,253		4.58	
ayroll Taxes		1,921		-		1.267		3,18	
egal Expenses		-		34,136				34,13	
structional Materials		403		-		1.50		40	
Other Fees for Services		-		20,337		-		20,337	
dvertising and Promotion Expenses		-		216		-		21	
occupancy Expenses ravel Expenses		-		1,365 40.321		-		1,36	
Ther Expenses	_		_	125,398			_	125,39	
Total	5	29,378	\$	241,148	\$	59,325	\$	329,85	
					School	í.			
		Program Services		nagement d General	Fu	ndraising		Total Expenses	
alaries and Wages	\$	913,775	\$	226,092	\$	-	\$	1,139,86	
ension Expense ther Employee Benefits		28,827 101,199		5,631 13.535		-		34,45	
ayroll Taxes		67,524		21,234		-		88,75	
egal Expenses		01,024		3.093				3,09	
ccounting Expenses		-		41.051				41,05	
structional Materials		132,889		-				132,88	
ther Fees for Services		428,277		4,523		-		432,80	
dvertising and Promotion Expenses		15,222		587		-		15,80	
				13,828		-		13,82	
		224,890						224,890	
occupancy Expenses				7.543				8,10	
Occupancy Expenses Travel Expenses		565		40.079					
Office Expenses Occupancy Expenses Travel Expenses Insurance Expense Other Expenses		20,764		19,973 144,748			_	19,973 165,513	

See accompanying Notes to Financial Statements.

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See accompanying Notes to Financial Statements.

(5)

ROOTED SCHOOL NOTES TO FINANCIAL STATEMENTS JUNE 30, 2020

NOTE 1 SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES

Nature of Activities

The Rooted School (the School) was created as a nonprofit corporation under the laws of the state of Louisiana in 2014. The School applied to the Orleans Parish School Board to operate a Type I charter school. The Orleans Parish School Board approved the charter of the School for a period of five years commencing on July 1, 2017 and ending on June 30, 2022. The school serves eligible students in ninth through twelfth grade.

The School received approximately 63% of its total revenues from federal and state grantors.

Basis of Accounting

The financial statements have been prepared on the accrual method of accounting and accordingly reflect all significant receivables and liabilities.

Basis of Presentation

The accompanying financial statements have been prepared in conformity with accounting principles generally accepted in the United States of America as prescribed by the Financial Accounting Standards Board.

Use of Estimates

The preparation of financial statements in conformity with accounting principles generally accepted in the United States of America requires management to make estimates and assumptions that affect the reported amounts of assets, liabilities, and disclosures. Accordingly, actual results could differ from those estimates.

Functional Allocation of Expenses

Costs of providing the School's programs and other activities have been presented in the statement of functional expenses. During the year, such costs are accumulated into separate groupings as either direct or indirect. Indirect or shared costs are allocated among program and support services by a method that best measures the relative degree of benefit.

Cash and Cash Equivalents

The School defines its cash and cash equivalents to include only cash on hand, demand deposits, and liquid investments with original maturities of three months or less.

Accounts Receivable

Accounts receivable primarily represent amounts due from federal and state governments as of June 30, 2020. Management believes that all receivables are fully collectible; therefore, no provisions for uncollectible accounts were recorded.

Compensated Absences

The School does not allow employees to carryover unused vacation. Accordingly, there were no accumulated compensated absence benefits at June 30, 2020.

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ROOTED SCHOOL NOTES TO FINANCIAL STATEMENTS JUNE 30, 2020

NOTE 1 SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (CONTINUED)

Net Asset Classes

Net assets, revenues, gains, and losses are classified based on the existence or absence of donor- or grantor-imposed restrictions. Accordingly, net assets and changes therein are classified and reported as follows:

Net Assets Without Donor Restrictions - Net assets available for use in general operations and not subject to donor (or certain grantor) restrictions.

Net Assets With Donor Restrictions – Net assets subject to donor- (or certain grantor-) imposed restrictions. Some donor-imposed restrictions are temporary in nature, such as those that will be met by the passage of time or other events specified by the donor. Other donor-imposed restrictions are perpetual in nature, where the donor stipulates that resources be maintained in perpetuity. Contributions restricted by donors as increases in net assets without donor restrictions if the restrictions expire (that is, when a stipulated time restriction ends or purpose restriction is accomplished) in the reporting period in which the revenue is recognized. All other donor-restricted contributions are reported as increases in net assets with donor restrictions. When a restriction expire, net assets with donor restrictions and recognized assets released from restrictions and reported in the statements of activities as net assets released from restrictions.

Revenue

The School's primary sources of funding are through the State Public School Fund and federal grants, as well as private donations. Federal grants are recorded on a cost reimbursement basis. An accrual is made when eligible expenses are incurred.

Revenue Recognition

Amounts received from the State Public School Fund are conditional and recognized as revenue by the School based on the enrollment of students. Revenue that is restricted is recorded as an increase in net assets without donor restriction, if the restriction expires in the reporting period in which the revenue is recognized. All other restricted revenues are reported as increases in net assets with donor restriction.

Contributions

All contributions are considered to be available for use unless specifically restricted by the donor. Amounts received that are restricted to specific use or future periods are reported as contributions with donor restrictions. Restricted contributions that are received and released in the same period are reported as promises to give without donor restrictions. Unconditional promises to give expected to be received in one year or less are recorded at that realizable value. Unconditional promises to give expected to be received in more than one year are recorded at fair value at the date of the promise. Conditional promises to give are not recognized until they become unconditional, that is, when the conditions on which they depend are substantially met.

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ROOTED SCHOOL NOTES TO FINANCIAL STATEMENTS JUNE 30, 2020

NOTE 1 SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (CONTINUED)

Conditional Grants

Grants and contracts that are conditioned upon the performance of certain requirements or the incurrence of allowable qualifying expenses are recognized as revenues in the period in which the conditions are met. Amounts received are recognized as revenue when the School has incurred expenditures in compliance with specific contract or grant provisions. Amounts received prior to incurring qualifying expenditures are reported as deferred revenues in the statement of financial position. The School has received cost reimbursable grants and conditional contributions of \$75,000 that have not been recognized at June 30, 2020 because qualifying expenditures have not been incurred.

Income Taxes

The School is a nonprofit entity exempt from the payment of income taxes under Internal Revenue Code Section 501(c)(3). Accordingly, no provision has been made for income taxes. Management has determined that all income tax positions are more likely than not of being sustained upon potential audit or examination; therefore, no disclosures of uncertain income tax positions are required. The School is subject to income tax on net income that is derived from business activities that are unrelated to the exempt purposes. The School files an exempt School return and applicable unrelated business income tax return in the U.S. federal jurisdiction.

Change in Accounting Principle

In May 2014, FASB issued Accounting Standards Update (ASU) 2014-09, Revenues from Contracts with Customers (Topic 606). The update establishes the core principle that an entity should recognize revenue to depict the transfer of promised goods or services to customers in the amount that reflects the consideration to which the entity expects to be entitled in exchange for those good or services. The School has early adopted the implementation of ASU 2014-09 under the full retrospective approach. There was no material impact on the School's financial position and results of operations upon adoption of the new standard.

In June 2018, FASB issued Accounting Standards Update (ASU) 2018-08, Not-for-Profit Entities (Topic 958) – Clarifying the Scope and the Accounting Guidance for Contributions Received and Contributions Made. The update clarifies and improves the scope and the accounting guidance for contributions received and contributions made. The amendments in this update should assist entities in (1) evaluating whether transactions should be accounted for as contributions (nonreciprocal transactions), or as exchange (reciprocal transactions) and (2) determining whether a contribution is conditional. The School has implemented ASU 2018-08 under the full retrospective approach. There was no material impact on the School's financial position and results of operations upon adoption of the new standard.

Evaluation of Subsequent Events

The School has evaluated subsequent events through December 11, 2020, the date these financial statements were available to be issued.

ROOTED SCHOOL NOTES TO FINANCIAL STATEMENTS JUNE 30, 2020

NOTE 2 LIQUIDITY AND AVAILABILITY

Financial assets available for general expenditure are those without donor or other restrictions limiting their use within one year of the statement of financial position date. Financial assets available for general expenditures comprise of the following:

Cash and Cash Equivalents	\$	476,274
Accounts Receivable - Federal and State		447,414
Less: Net Assets With Donor Restrictions		(266,713)
Total	S	656,975

As part of its liquidity management plan, the School monitors liquidity required and cash flows to meet operating needs on a monthly basis. The School structures its financial assets to be available as general expenditures, liabilities, and other obligations come due.

NOTE 3 CONCENTRATION OF CREDIT RISK

The School maintains cash balances held in banks and revolving funds which are insured up to \$250,000 by the Federal Depository Insurance Corporation (FDIC). At times, cash in these accounts exceeds the insured amounts. The School has not experienced any losses in such accounts and believes it is not exposed to any significant credit risk on its cash and cash equivalents.

NOTE 4 LOANS PAYABLE

Paycheck Protection Program Loan

The School obtained a loan in the amount of \$285,495 through the Paycheck Protection Program administrated by the U.S. Small Business Administration, which is part of the Coronavirus Aid Relief and Economic Security Act. The original loan agreement was written prior to the PPP Flexibility Act of 2020 (June 5) and was due over 24 months deferred for six months, Subsequent to this, the law changed the loan deferral terms retroactively. The PPP Flexibility Act and subsequent regulations supersede the loan agreement. The PPP Loan bears interest at a fixed rate of 1.0% per annum, with the first six months of interest deferred, has a term of two years, and is unsecured and guaranteed by the U.S. Small Business Administration, Payment of principal and interest is deferred until the date on which the amount of forgiveness is remitted to the lender or, if the organization fails to apply for forgiveness within 10 months after the covered period, then payment of principal and interest shall begin on that date. These amounts may be forgiven subject to compliance and approval based on the timing and use of these funds in accordance with the program. To the extent that all or part of the PPP Loan is not forgiven, the School will be required to pay interest on the PPP Loan at a rate of 1.0% per annum, and commencing in 2021. Principal and interest payments will be required through the maturity date in 2022.

(8)

(10)

ROOTED SCHOOL NOTES TO FINANCIAL STATEMENTS JUNE 30, 2020

NOTE 4 LOANS PAYABLE (CONTINUED)

Economic Injury Disaster Loan

The School obtained a loan in the amount of \$10,000 through the U.S. Small Business Administration to meet financial obligations and operating expenses that could have been met had the disaster not occurred. The Loan bears interest at a fixed rate of 2.75% per annum and has a term of 30 years.

Charter School Growth Fund Loan

The School obtained a loan in the amount of \$50,000 through the Charter School Growth Fund. The Loan bears no interest as is due on November 2021.

Future maturities under notes payable are as follows:



NOTE 5 EMPLOYEE RETIREMENT

Defined Contribution Plan

The School offers an Internal Revenue Code Section 401(k) retirement plan to each of its qualifying employees. Employer and employee contributions are used to purchase annuity contracts for each participant employee. Employer matching contributions are made as a percentage of elective deferrals for each employee who is eligible for employer contributions. Additionally, the employer may elect to make a discretionary contribution for each qualifying employee for each plan year. The amount of employer contributions used to purchase annuity contracts for the year ended June 30, 2020 was \$37,108.

NOTE 6 NET ASSETS WITH DONOR RESTRICTIONS

Net assets with donor restrictions are restricted for the following purposes. Net assets were released from donor restrictions by incurring expenses satisfying the restricted purpose specified by the donors as follows for the years ended June 30:

Net Assets With Donor Restrictions:	6/30/2019		Additions		Releases		6/30/2020	
Subject to Specific Purpose Expansion in Washington State	\$		\$	37.000	\$	20.287	s	16.713
Subject to Passage of Time Restrictions								
Expansion of Rooted Campuses		2		250,000				250,000
Total Net Assets With Donor Restrictions	\$		\$	287,000	\$	20,287	\$	266,713

ROOTED SCHOOL NOTES TO FINANCIAL STATEMENTS JUNE 30, 2020

NOTE 7 RELATED PARTY TRANSACTIONS

In 2017, Rooted School entered into an agreement with The Mind Trust, an Indiana nonprofit corporation, to support the opening of Rooted School-Indianapolis, an affiliated charter school in Indianapolis. Rooted School has supported the affiliated entity by serving as a fiduciary pass through entity for grants through The Mind Trust and the Charter School Growth Fund. For the year ended June 30, 2020, Rooted School passed through a total of \$125,000 to the affiliated charter school in Indianapolis. For a portion of the fiscal year, Rooted School paid a total of \$35,235 of salary expenses for the School Leader of the Indianapolis charter school for which Rooted School has a receivable for this amount as of June 30, 2020.

NOTE 8 FUNCTIONALIZED EXPENSES

The financial statements report certain categories of expenses that are attributed to more than one program or supporting function(s). Therefore, expenses require allocation on a reasonable basis that is consistently applied. The expenses that are allocated include salaries and wages, pension expense, other employee benefits, payroll taxes, other fees for services, office expenses, pinting and postage, information technology, and other expenses, which are allocated on the basis of estimates of time and effort.

NOTE 9 CONTINGENCIES, COMMITMENTS AND UNCERTANTIES

The School has received state and federal funds for specific purposes that are subject to review and audit by the grantor agencies. Although such audits could generate disallowances under terms of the grants, it is believed that any required reimbursement would not be material.

The extent of the impact of COVID-19 on the operational and financial performance of the School will depend on certain developments, including the duration and spread of the outbreak, impact on state and federal funding, donors, employees and vendors; all of which are uncertain and cannot be predicted. At this point, the extent to which COVID-19 may impact the financial condition or results of operations of the School is uncertain.

Specific to the School, COVID-19 may impact various parts of its 2021 operations and financial results, including funding sources determined by economic activity. Management believes the School is taking appropriate actions to mitigate the negative impact. The School received a loan in the amount of \$285,495 to fund payroll, rent, utilities, and interest on mortgages and existing debt through the federal Paycheck Protection Program. These amounts may be forgiven subject to compliance and approval based on the timing and use of these funds in accordance with the program.

(12)

(11)



INDEPENDENT AUDITOR'S REPORT ON INTERNAL CONTROL OVER FINANCIAL REPORTING AND ON COMPLIANCE AND OTHER MATTERS BASED ON AN AUDIT OF FINANCIAL STATEMENTS PERFORMED IN ACCORDANCE WITH GOVERNMENT AUDITING STANDARDS

Board of Directors Rooted School New Orleans, Louisiana

We have audited, in accordance with the auditing standards generally accepted in the United States of America and the standards applicable to financial audits contained in *Government Auditing Standards* issued by the Comptroller General of the United States, the financial statements of Rooted School (the School), a nonprofit public benefit corporation, which comprise the statement of financial position as of June 30, 2020, and the related statements of activities, cash flows, and functional expenses for the year then ended, and the related notes to the financial statements, and have issued our report thereon dated December 11, 2020.

Internal Control Over Financial Reporting

In planning and performing our audit of the financial statements, we considered the School's internal control over financial reporting (internal control) to determine the audit procedures that are appropriate in the circumstances for the purpose of expressing our opinion on the financial statements, but not for the purpose of expressing an opinion on the effectiveness of the School's internal control. Accordingly, we do not express an opinion on the effectiveness of the School's internal control.

A deficiency in internal control exists when the design or operation of a control does not allow management or employees, in the normal course of performing their assigned functions, to prevent or detect and correct misstatements on a timely basis. A *material weakness* is a deficiency or a combination of deficiencies in internal control such that there is a reasonable possibility that a material misstatement of the financial statements will not be prevented or detected and corrected on a timely basis. A *significant deficiency* is a deficiency, or a combination of deficiencies, in internal control that is less severe than a material weakness, yet important enough to merit attention by those charged with governance.

Our consideration of internal control was for the limited purpose described in the first paragraph of this section and was not designed to identify all deficiencies in internal control that might be material weaknesses or significant deficiencies. Given these limitations, during our audit we did not identify any deficiencies in internal control that we consider to be material weaknesses. However, material weaknesses may exist that have not been identified.



(13)

Board of Directors Rooted School

Compliance and Other Matters

As part of obtaining reasonable assurance about whether the School's financial statements are free from material misstatement, we performed tests of its compliance with certain provisions of laws, regulations, contracts, and grant agreements, noncompliance with which could have a direct and material effect on the determination of financial statement amounts. However, providing an opinion on compliance with those provisions was not an objective of our audit, and accordingly, we do not express such an opinion. The results of our tests disclosed no instances of noncompliance or other matters that are required to be reported under *Government Auditing Standards*.

Purpose of this Report

The purpose of this report is solely to describe the scope of our testing of internal control and compliance and the results of that testing, and not to provide an opinion on the effectiveness of the entity's internal control or on compliance. This report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering the entity's internal control and compliance. Accordingly, this communication is not suitable for any other purpose.

Clifton Larson Allen LLP

CliftonLarsonAllen LLP

Glendora, California December 11, 2020

(14)

ROOTED SCHOOL SCHEDULE OF FINDINGS YEAR ENDED JUNE 30, 2020 ROOTED SCHOOL SCHEDULE OF PRIOR YEAR FINDINGS YEAR ENDED JUNE 30, 2020

There were no findings for the year ended June 30, 2020.

There were no findings for the year ended June 30, 2019.

(15)

(16)

ROOTED SCHOOL SCHEDULE OF COMPENSATION, BENEFITS, AND OTHER PAYMENTS TO THE AGENCY HEAD YEAR ENDED JUNE 30, 2020

Agency Head: Jonathan Johnson	
Purpose	Amount
Salary	\$ 103,000
Benefits - Employer Portion of Retirement	2,120
Benefits - Employer Portion of Medical/Dental/Vision	4,505
Benefits - FICA Medicare	17,918
Total	\$ 127,543

SCHEDULES REQUIRED BY LOUISIANA STATE LAW

(R.S. 24:514 - PERFORMANCE AND STATISTICAL DATA)

(17)



INDEPENDENT ACCOUNTANTS' REPORT ON APPLYING AGREED-UPON PROCEDURES

Board of Directors Rooted School New Orleans, Louisiana

We have performed the procedures enumerated below, which were agreed to by Rooted School (the School); the Louisiana Department of Education, and the Louisiana Legislative Auditor (the specified parties), on the performance and statistical data accompanying the annual financial statements of the School for the fiscal year ended June 30, 2020; and to determine whether the specified schedules are free of obvious errors and omissions as provided by the Board of Elementary and Secondary Education (BESE) Bulletin 126, in compliance with Louisiana Revised Statute 24:514 I. Management of the School is responsible for its performance and statistical data. The sufficiency of these procedures is solely the responsibility of the specified parties. Consequently, we make no representation regarding the sufficiency of the procedures enumerated below either for the purpose for which this report has been requested or for any other purpose.

Our procedures and findings relate to the accompanying schedules of supplemental information and are as follows:

General Fund Instructional and Support Expenditures and Certain Local Revenue Sources (Schedule 1)

- We selected a random sample of 25 transactions and reviewed supporting documentation to determine if the sampled expenditures/revenues are classified correctly, based on description and nature of the revenue/expense, and are reported in the proper amounts for each of the following amounts reported on the schedule:
 - Total General Fund Instructional Expenditures,
 - Total General Fund Equipment Expenditures,
 - Total Local Taxation Revenue,
 - Total Local Earnings on Investment in Real Property.
 - · Total State Revenue in Lieu of Taxes,
 - · Nonpublic Textbook Revenue, and
 - Nonpublic Transportation Revenue.

Findings:

None.



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Board of Directors Rooted School

Class Size Characteristics (Schedule 2)

We obtained a list of classes by school, school type, and class size as reported on the schedule.
 We then traced all classes to the October 1st roll books for those classes and determined if the class was accurately classified on the schedule.

Findings:

None.

Education Levels of Public School Staff (NO SCHEDULE)

3. We obtained October 1st PEP data submitted to the Department of Education (or equivalent listing prepared by management), including full-time teachers, principals, and assistant principals by classification, as well as their level of education and experience, and obtained management's representation that the data/listing was complete. We then selected all teachers and the principal, traced to each individual's personnel file, and observed that each individual's education level and experience was property classified on the PEP data or equivalent listing prepared by management.

Findings: None.

Public School Staff Data: Average Salaries (NO SCHEDULE)

4. We obtained June 30th PEP data submitted to the Department of Education (or equivalent listing provided by management) of all classroom teachers, including base salary, extra compensation, and ROTC or rehired retiree status, as well as full-time equivalents, and obtained management's representation that the data/listing was complete. We then selected all teachers, traced to each individual's personnel file, and observed that each individual's salary, extra compensation, and full-time equivalents were properly included on the PEP data (or equivalent listing prepared by management).

Findings: None.

This agreed-upon procedures engagement was performed in accordance with attestation standards established by the American Institute of Certified Public Accountants, and the standards applicable to attestation engagements contained in *Government Auditing Standards*, issued by the United States Comptroller General. We were not engaged to and did not conduct an examination or review, the objective of which would be the expression of an opinion or conclusion, respectively, on the performance and statistical data. Accordingly, we do not express such an opinion or conclusion. Had we performed additional procedures, other matters might have come to our attention that would have been reported to you.

(19)

Board of Directors Rooted School

The purpose of this report is solely to describe the scope of testing performed on the performance and statistical data accompanying the annual financial statements of the (City or Parish School Board or Charter School), as required by Louisiana Revised Statue 24:514.1, and the result of that testing, and not to provide an opinion on control or compliance. Accordingly, this report is not suitable for any other purpose. Under Louisiana Revised Statute 24:513, this report is distributed by the Louisiana Legislative Auditor as a public document.

Clifton Larson Allen LLP

CliftonLarsonAllen LLP

Glendora, California December 11, 2020

ROOTED SCHOOL GENERAL FUND INSTRUCTIONAL AND SUPPORT EXPENDITURES AND CERTAIN LOCAL REVENUE SOURCES SCHEDULE 1 YEAR ENDED JUNE 30, 2020 (SEE INDEPENDENT ACCOUNTANTS' REPORT ON AGREED-UPON PROCEDURES.)

General Fund Instructional and Equipment Expenditures	Column A	c	olumn B
General Fund Instructional Expenditures:			
Teacher and Student Interaction Activities:			
Classroom Teacher Salaries	667,775		
Instructional Staff Employee Benefits	161,984		
Purchased Professional and Technical Services	30,424		
Instructional Materials and Supplies	69,939		
Total Teacher and Student Interaction Activities		5	930,122
Other Instructional Activities			8,783
Pupil Support Services	85,840		
Less: Equipment for Pupil Support Services			
Net Pupil Support Services			85,840
Instructional Staff Services	7,010		
Less: Equipment for Instructional Staff Services			
Net Instructional Staff Services			7,010
School Administration	592,073		
Less: Equipment for School Administration	-		
Net School Administration			592,073
Total General Fund Instructional Expenditures			
(Total of Column B)		\$	1,623,828
Total General Fund Equipment Expenditures			
(Object 730; Functional Series 1000-4000)		\$	
Local Revenue Sources			
Other Revenue from Local Sources:			
Contributions and Donations		\$	264,234
Miscellaneous Revenues:			
Local Revenue Trans. From Other LEA.			1,068,777
Other Miscellaneous Revenues			146.348
Total Revenues from Local Sources		\$	1,479,359

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ROOTED SCHOOL CLASS SIZE CHARACTERISTICS SCHEDULE 2 YEAR ENDED JUNE 30, 2020 (SEE INDEPENDENT ACCOUNTANTS' REPORT ON AGREED-UPON PROCEDURES.)

	Class Size Range										
School Type	1-20		21-26		27-33		34	4+			
	Number	Percent	Number	Percent	Number	Percent	Number	Percent			
Elementary	3 8		2	1 1		2					
Elementary Activity Class			ą;	<u> </u>		2					
Middle High											
Middle High Activity Class			8			2		<u></u>			
High	55	74%	15	20%	1	1%	3	4%			
High Activity Class			3	2							
Combination											
Combination Activity Class	1 S	D.	Q (1 - S		2	0.00				

vestment advisory services are offered through CliftonLarsonAllen Wealth Advisors



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Attachment 27 School Data Request Template [See Upload]