



Chan Zuckerberg Foundation Final Report January 31, 2019

Organization Name

Summit Public Schools

Grant Title

Summit Learning Program

Grant Amount

\$23,802,779

Grant Period

August 1, 2018 to January 31, 2019

Date of Report

January 31, 2019

Contact Name

Wilita Sanguma, wsanguma@summitps.org, [REDACTED]

Grant Purpose

To support the Summit Learning Program, with a specific emphasis on partner school success.

Report Guidelines

Each Report shall include (i) a summary of all activities performed using Grant Payments not included in a prior Report; (ii) a summary of the actual expenditures by budget category funded by the Grant Payments not included in a prior Report; (iii) a narrative regarding the SLP's progress and findings to date with respect to: (A) the number of students reached; (B) district growth and retention; (C) district expansion; (D) school growth and retention; and (E) school expansion; and (iv) such other information as CZF may reasonably request.





I. Project Update:

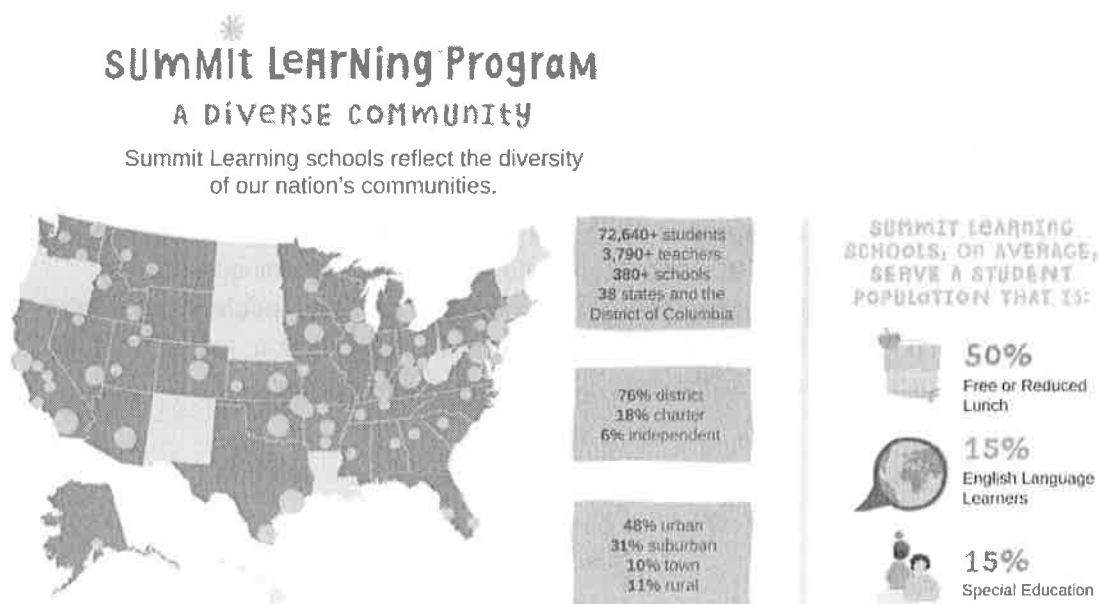
Through our work to date, the Summit Learning Program continues to provide our partner schools with access to the Summit Learning Platform (SLP); comprehensive curriculum and assessments; in-person professional development and training; and ongoing support and mentorship that also supports regional collaboration.

We aim to continue to successfully implement Summit Learning at all our Summit Learning Program partner schools across the nation. As we continue growing the Program, we expect to serve new students and schools in 2019-20 and deepen our work with existing partners. Furthermore, we will continue to improve the quality of the curriculum by building key additions to the Base Curriculum. This includes updating content resources, creating project summaries to make them easier for teachers to understand, using and adapting project resources; more clearly linking projects and content with standards, and launching new tools to help teachers apply the Cognitive Skills Rubric.

The following details our work.

Expansion of the Summit Learning Program

Since 2015, we have partnered with more than 380 schools to bring Summit Learning to nearly 3,800 teachers and over 72,000 students across 38 states through the Summit Learning Program.





This diverse community of partners is exploring Summit Learning and adapting it to meet the specific needs of their individual classrooms and schools. These schools are 76% district schools, 18% charter schools, and 6% independent schools, and are located in towns, rural counties, urban areas and suburban areas. Each school has the ability to influence the design of the Summit Learning Platform and contribute to the core Summit Learning curriculum. What they all have in common is a desire to reach every single student, providing them with a personalized education that equips them to lead a fulfilled life.

Schools participating in the Summit Learning Program represent the diversity of the country and are living proof that personalized learning can benefit all students and systems. We are serving a diverse student population that is 50% Free or Reduced Lunch, 15% English Language Learners, and 15% Special Education.

Academic Impact

Across the Community, schools are adapting Summit Learning to fit their needs, and how they define student success varies. Schools have reported promising signs of progress including gains in state test scores, greater student engagement, increased attendance, and better behavior. Across the entire Program, Summit Learning Schools performed as expected on traditional measures, which is no small feat based on Summit's own experience. For example, Summit Learning students who started the furthest behind made the biggest academic gains. Additionally, on average, Summit Learning students achieved an academic year's worth of growth in math and reading. The following case studies display the impact of Summit Learning at a couple of our partner schools. More case studies can be found [here](#).¹

Community and District Engagement Fuels Program Success

Snow Hill Middle School has a mission of "providing individual learning opportunities that engage every child and prepares them for college and career." In 2016, the leadership team at Snow Hill Middle School saw evidence of an achievement gap in their student test scores. So, they made it a goal to boost student learning, especially for students who were struggling. Former Worcester County Public Schools (WCPS) Superintendent Dr. Jerry Wilson heard about Summit Learning at a conference and learned that the approach had helped many students who were the furthest behind make big gains. He recommended the Summit Learning Program to Snow Hill Middle School, with the goal of the school working closely with the district and community to make it successful. In 2016-17, Snow Hill Middle School brought Summit Learning to all 75 of its 6th graders.

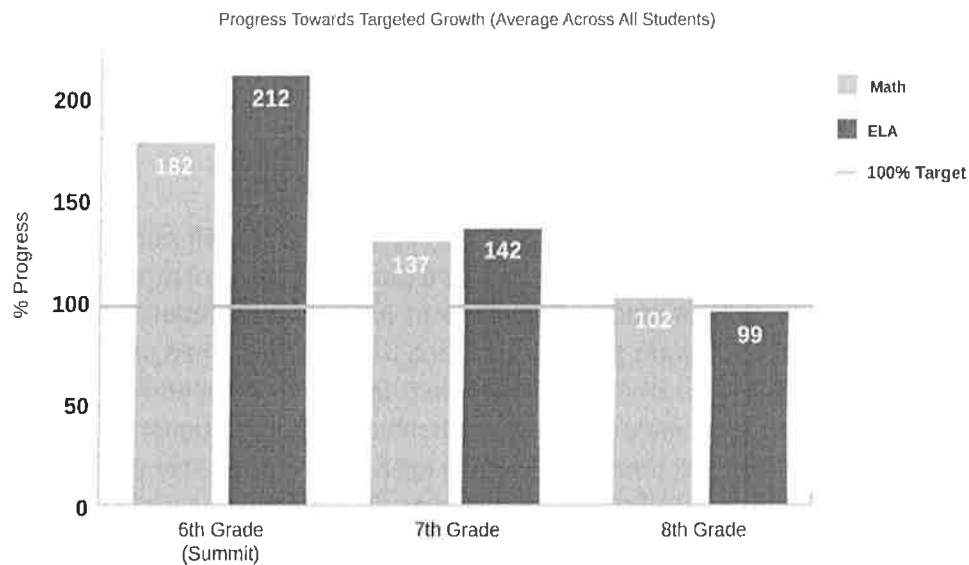
In the first year of Summit Learning at Snow Hill Middle School, 6th grade students made big gains, far exceeding their projected growth on i-Ready assessments — and the growth of other Snow Hill Middle School grades that didn't participate in Summit Learning. In addition, in focus groups conducted by Snow Hill Middle School, students and teachers reported that Summit

¹ Case studies: <https://blog.summitlearning.org/tag/case-studies/>





Learning has helped students develop key skills such as collaboration, resilience, independence, and awareness of their learning preferences and strategies that help them learn best. With these positive impacts, WCPS awarded the Snow Hill Middle School 6th grade team with a "Celebrating Innovation" recognition, and now the district high school is considering adopting Summit Learning.



Community and family engagement has been critical to Snow Hill Middle School's success with Summit Learning. From the beginning, the Snow Hill Middle School team worked hard to help district leadership understand and support the Program, highlighting how it supported a key strategy the district identified in its strategic plan: to personalize learning for students so that they can deepen their understandings of themselves and their own pathways to success.

As a result of the school's work to keep the WCPS stakeholders involved and informed, the district supported Snow Hill Middle School in adjusting the school schedule to enable students to have time to develop self-direction in their learning. Teachers were also given more time for collaboration and attending Summit Learning trainings and convenings — which Principal Christina Welch calls "the best [professional development] I've attended." In addition, Snow Hill Middle School teachers and leaders work closely with district staff to examine data and determine student progress with Summit Learning.

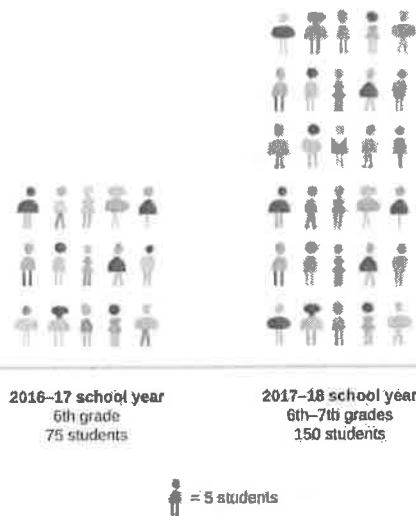
Snow Hill Middle School also made it a point to involve parents early and help them understand



the Program. The school held multiple meetings and events throughout the year to provide parents with opportunities to learn about and ask questions, and they offered meetings at different times of day so that all parents could attend. With this strong engagement and open communication, parents have been largely supportive of Summit Learning and know that they can contact Snow Hill Middle School at any time with questions or feedback.

GROWTH AND EXPANSION AT SNOW HILL

- Snow Hill adopted Summit Learning in its 6th grade in the 2016–17 school year
- Expanded to 7th grade in the 2017–18 school year, with plans to expand to 8th grade in 2018–19



Snow Hill Middle School
Snow Hill, MD

After a successful first year of implementing Summit Learning with its 6th grade class, SHMS expanded the program to include all 150 of their 6th and 7th grade students in the 2017-18 year. In the 2018-19 school year, Snow Hill Middle School plans to include 8th grade students in the program as well.

Student Growth Increases with Summit Learning

Distinctive Schools, a non-profit School Management Organization, manages four Chicago International Charter Schools (CICS): CICS Bucktown, CICS Irving Park, CICS Prairie, and CICS West Belden. Of the four schools, 76% receive Free or Reduced Lunch, 26% are English Learners, and 13% have an Individualized Education Plan. These schools are part of the Chicago Public Schools District, which serves 370,000 students across the city.

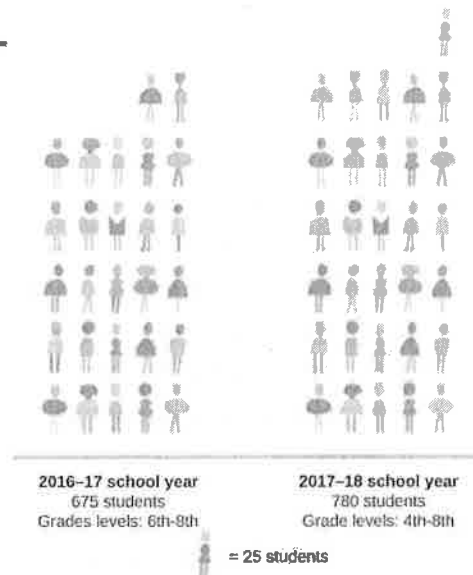
Distinctive Schools teachers and staff were looking for a way to help students see not only year-to-year growth, but also sustained growth on state assessments throughout their entire education. They also wanted to help students develop lifelong Habits of Success, and, as a result, sought out personalized learning as a way to build these skills. After researching different personalized learning options, leaders at Distinctive Schools chose Summit Learning because



of its focus on helping students take ownership of their goals, as well as its focus on Real-World Projects and 1:1 Mentorship. Faculty also saw value in receiving a real-time assessment of student performance and growth via the Summit Learning Platform, allowing teachers, parents, and students to make informed decisions and set realistic objectives for each student.

GROWTH AND EXPANSION AT DISTINCTIVE SCHOOLS

- Started with Summit Learning in 6th–8th grades (675 students) in 2016
- Expanded to new grades in 2017–18 school year
- Currently serve a total of 780 students in 4th–8th grades



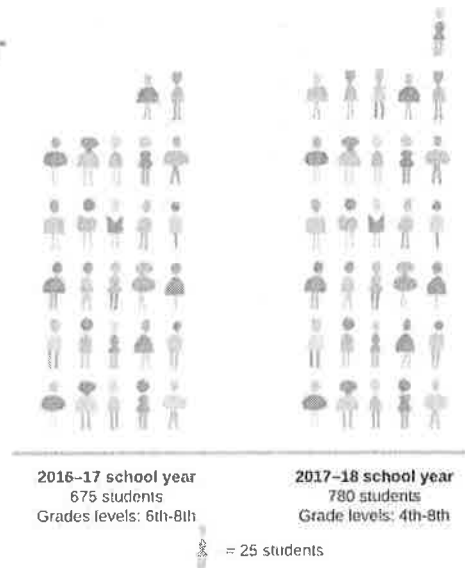
Distinctive Schools
Chicago, IL

In 2016, Distinctive Schools implemented Summit Learning across its campuses. Teachers embraced their roles as mentors and used the Platform to connect with each student. “By using technology some of the time,” says Anthony Claypool, Distinctive School’s Director of Curricular Programs & Data, “we have the ability to get our teachers thinking about one individual kid and what they need.” CICS teachers also have ample opportunity for personalized professional development. Since implementing Summit Learning, 6th–8th grade students across all four campuses have shown significant growth in both math and reading. Students showed more growth in 2017 on NWEA MAP than middle school students the previous year. The percentage of students at or above the 50th percentile also increased by seven points in math and six points in reading in 2017 compared to 2016.



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Distinctive Schools
Chicago, IL

In 2017-18, Distinctive Schools expanded the use of Summit Learning to new grades. Today, 780 students participate in the Summit Learning Program. Distinctive Schools' teachers' unified commitment to implementing all three pillars of Summit Learning enables them to meet the unique needs of their classrooms, while ongoing collaboration and communication continue to be the keys to success for satisfied students, teachers, and parents.

II. Lessons Learned and Next Steps

Setting a Precise Definition and a Clear Expectation of the School Journey

We are working with urgency to continue to refine how we define what successful Summit Learning implementation looks like to set a clear expectation on how Summit Learning should be implemented to ensure that students can achieve the Summit Learning commencement outcomes. Over the past few years, we have worked to refine our metrics with the understanding that the definition of student success varies depending on the school. By setting a clear and precise definition of and measurement of Summit Learning commencement outcomes, we can have a better understanding of the Summit Learning implementation by our partnered school as well as provide targeted support to ensure that students are achieving the Summit Learning commencement outcomes. We are now setting clear expectations that schools need to implement all three components of the instructional approach (i.e., Project-Based Learning, 1:1 Mentoring and a Self-Directed Learning cycle), which are the foundation of Summit Learning.

During the first few years of the Summit Learning Program, we supported schools in tailoring the Summit Learning instructional approach to their community's needs. In some cases, schools





only adopted one or two components of Summit Learning. Others joined the Program primarily to access the Summit Learning Platform. However, Summit Learning is a comprehensive approach to teaching and learning - not an add-on or a technology intervention. Learning science, research, and our experience tells us that it takes all three components working together to drive the commencement-level outcomes we collectively want for all students. For example, students need coaching and support to engage in the self-directed learning cycle. Without a strong mentoring program, students don't have the opportunity to receive feedback on their individual goals and progress. Projects require students to apply what they have learned and to collaborate with their peers to solve complex problems. They demonstrate their emerging fluency of Cognitive Skills in a way that wouldn't be possible without a project-based learning classroom setting.

III. Financial Information

Please offer an update on the project's spending in the previous period. If either past or projected spending differs significantly (>10%) from the original budget, please share an analysis and explanation of the changes.

We are extremely grateful for the support of the Chan Zuckerberg Foundation. Your support continues to enable us to work with urgency to ensure that if schools want to use Summit Learning, they are supported and able to do so.

This section highlights the Summit Learning Program Financials through December 31, 2018. The accompanying financial statements for Summit Public Schools includes the Summit Learning Program. While the fiscal year is not yet complete, Summit will provide updated financials after the fiscal year end closes.

Budget vs. Actual			
From Jul 2018 to December 2018			
Summit Learning Program			
Financial Row	SH 2018 Actual*	SH 2018 Budget	Variance F/(U)
Grant	\$23,802,779	\$26,351,864	(\$2,549,085)
Expense			
Compensation & Benefits	\$8,402,771	\$9,964,380	\$1,561,609
Books & Supplies	\$682,045	\$741,353	\$59,308
Travel and Conferences	\$5,722,724	\$9,689,866	\$3,967,142
Consultants	\$3,968,330	\$3,601,808	(\$366,522)
Services & Other Operating Expenses	\$3,004,241	\$2,780,028	(\$224,213)



Total - Expense	\$21,780,111	\$26,777,435	\$4,997,324
Remainder	\$2,022,668	(\$425,571)	\$2,448,239
* Includes delayed billing expenses received after 12/31/2018			

Variances to Date

- **Compensation & Benefits:** Summit Learning ramped up the 2018-2019 program year at a slower than expected hiring pace. This has created a variance for both compensation and benefits. Rapid hiring is now commencing for multiple positions.
- **Books and Supplies:** The variance is less than 10%.
- **Travel and Conferences:** As Summit Learning continues to grow, the program continues to modify and improve the travel and training process for the program. As the program grows to more regions, training and convening are dispersed to a wider area allowing for lower local costs which cannot fully be anticipated during the budget cycle. Additionally, 25 mentors moved out of the San Francisco Bay Area to locations more central to their travel; this has also impacted the ongoing travel expense that was not anticipated.
- **Consultants:** Consultant costs are tracking slightly ahead of budget due to ramping up "New Org" needs such as a website and enhanced curriculum work and other Summit Learning initiatives.
- **Services & Other Operating Expenses:** This is a broad collection of items that are mostly on track. A few items that have been affected by budget timing include Schools Marketing which will pick up this season (late winter, early spring) as the renewal contracts are initiated, and other support costs which are also subject to budget timing variances.





Summit Public Schools Final Report June 2017

Grant Overview

Organization name:	Summit Public Schools
Contact name, email, and phone #:	Diane Tavenner dtavenner@summitps.org [REDACTED]
Date of report:	June 29, 2017
Grant period:	July 1, 2016 - June 30, 2017
Grant amount:	\$20,000,000
Grant title:	Summit Public Schools
Grant purpose:	Scale Personalized Learning Nationally

Financial Update

Please find enclosed a budget report through May 2017. We will submit a final budget report once we have closed the year, as well.

The enclosed report covers the year-to-date financial activity through May 2017 for:

- SPS Central
- SPS CA Schools
- SPS WA

CA Central Office:

- Net Operating Surplus favorable variance to budget: **+\$3.6M**
- Significant variances include:
 - o Comps and benefits (favorable variance of **\$1.0M**). We will not hire all of the positions in the budget. We will continue to see a positive variance through year end.
 - o Books and Supplies (unfavorable variance of **\$1.1M**). These are timing variances due to SLP hosted convening events and SLP software services.
 - o Other Operating Expenses (favorable variance of **\$1.7M**). This is primarily due to an under spending of SLP partner and SLP employee travel expense.
- Fundraising is ahead of schedule for 16/17 (**\$2.0M** favorable variance); partially due to large grant for Denali TI grant.

CA Schools:

- Net Operating Surplus unfavorable variance to budget: **-\$931K**
- Significant variances include:
 - o Revenue **\$440K** unfavorable variance due to revenue timing issues. Strong enrollment contributes to positive variance at year end.
 - o Technology and furniture purchases are under budget for a favorable variance of **\$641K**.
 - o Other Operating expenses unfavorable variance of **\$1.4M** due to Shasta and Denali facilities expenses.
 - o Parent fundraising is a favorable variance of **\$343K** (Summit Prep, Denali, and Everest.)
- Enrollment holds strong at **2,725** (+61 students from Nov Budget Revise).

California	Summit Prep	Everest	Rainier	Tahoma	Shasta	Denali	K2	Tam	Total
Rev Budget	407	385	352	302	404	387	308	119	2664
May 31 Actual	416	395	357	304	420	402	315	116	2725

SPS Washington:

- Net operating favorable variance year to date budget: \$491K. The region is projecting a \$372K surplus for the fiscal year.
- Significant variances include:
 - o \$432K favorable variance due to \$400K CSGF grant payment

Washington	Olympus	Sierra
Rev Budget	150	200
May 31 Actual	114	189

CA Balance Sheet

On May 31, 2017, our cash balance for CA accounts is **\$15.2M**

All schools are positive cash balance except Shasta (facilities) and Denali (operating and facilities.)

WA Balance Sheet

- On May 31, 2017, our cash balance for WA accounts is \$2.1M
- We are on track to meet the authorizer-required cash balances (August 31, 2017 –30 days of cash on hand.)

Summit Public Schools

Summary - Variance to Budget
Through May 31 2017

	SPS Central			SPS Central			California			SPS WA			SPS WA			Variance (\$) F / (U)
	Office	Office	Variance (\$) F / (U)	Office	Office	Variance (\$) F / (U)	Schools	Schools	(YTD Actual)	All	All	(YTD Actual)	All	All	(YTD Actual)	
Revenue	(YTD Rev Budget,	(YTD Actual)		(YTD Rev Budget,	(YTD Actual)		(YTD Rev Budget,	(YTD Actual)		(YTD Rev Budget,	(YTD Actual)		(YTD Rev Budget,	(YTD Actual)		
Principal Apportionment	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 19,969,047	\$ 19,151,182	\$ (817,865)	\$ 1,880,572	\$ 1,839,587	\$ (40,986)	\$ 1,880,572	\$ 1,839,587	\$ (40,986)	
Federal Revenue	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 845,502	\$ 377,154	\$ (468,348)	\$ 85,677	\$ 119,569	\$ 33,892	\$ 85,677	\$ 119,569	\$ 33,892	
Other State Revenue	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 1,841,471	\$ 2,531,956	\$ 690,485	\$ 491,695	\$ 511,673	\$ 19,979	\$ 491,695	\$ 511,673	\$ 19,979	
Other Local Revenue	\$ -	\$ 7,076	\$ 7,076	\$ -	\$ 7,076	\$ 7,076	\$ 421,760	\$ 577,587	\$ 155,827	\$ -	\$ 20,333	\$ 20,333	\$ -	\$ 20,333	\$ 20,333	
SPS Support Services	\$ 3,640,343	\$ 3,640,343	\$ -	\$ 3,640,343	\$ 3,640,343	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Total Revenue	\$ 3,640,343	\$ 3,647,419	\$ 7,076	\$ 3,640,343	\$ 3,647,419	\$ 7,076	\$ 23,077,780	\$ 22,637,879	\$ (439,901)	\$ 2,457,944	\$ 2,491,162	\$ 33,218	\$ 2,457,944	\$ 2,491,162	\$ 33,218	
Operating Expenses																
Compensation and Benefits	\$ 14,573,445	\$ 13,546,847	\$ 1,026,598	\$ 14,573,445	\$ 13,546,847	\$ 1,026,598	\$ 11,849,703	\$ 11,952,103	\$ 102,400	\$ 2,351,133	\$ 2,412,098	\$ 60,964	\$ 2,351,133	\$ 2,412,098	\$ 60,964	
Books, Supplies and Technology	\$ 894,240	\$ 1,979,139	\$ (1,084,899)	\$ 894,240	\$ 1,979,139	\$ (1,084,899)	\$ 3,402,535	\$ 2,760,724	\$ (641,811)	\$ 506,689	\$ 451,917	\$ (54,771)	\$ 506,689	\$ 451,917	\$ (54,771)	
Other Operating Expenses	\$ 11,891,078	\$ 10,227,931	\$ 1,663,147	\$ 11,891,078	\$ 10,227,931	\$ 1,663,147	\$ 4,501,225	\$ 5,887,724	\$ 1,386,499	\$ 1,406,889	\$ 1,374,835	\$ (32,054)	\$ 1,406,889	\$ 1,374,835	\$ (32,054)	
SPS Support Services	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 3,640,343	\$ 3,640,383	\$ 40	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Depreciation	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Total Operating Expenses	\$ 27,358,763	\$ 25,753,917	\$ 1,604,846	\$ 27,358,763	\$ 25,753,917	\$ 1,604,846	\$ 23,393,807	\$ 24,240,935	\$ 847,128	\$ 4,264,711	\$ 4,238,850	\$ (25,861)	\$ 4,264,711	\$ 4,238,850	\$ (25,861)	
Operating Surplus / (Deficit)	\$ (23,718,420)	\$ (22,106,498)	\$ 1,611,922	\$ (23,718,420)	\$ (22,106,498)	\$ 1,611,922	\$ (316,027)	\$ (1,603,056)	\$ (1,287,029)	\$ (1,806,767)	\$ (1,747,688)	\$ 59,079	\$ (1,806,767)	\$ (1,747,688)	\$ 59,079	
Other Income / (Expense)																
Parent Fundraising	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 342,786	\$ 342,786	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
SPS Fundraising	\$ 26,353,523	\$ 28,345,289	\$ 1,991,767	\$ 26,353,523	\$ 28,345,289	\$ 1,991,767	\$ 1,695,000	\$ 1,695,000	\$ 0	\$ 2,000,000	\$ 2,432,648	\$ 432,648	\$ 2,000,000	\$ 2,432,648	\$ 432,648	
Grants to Schools - Startup	\$ (1,695,000)	\$ (1,695,000)	\$ -	\$ (1,695,000)	\$ (1,695,000)	\$ -	\$ -	\$ 0	\$ 0	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Grants to Schools - 0.25 FTE Teacher Offset							\$ -	\$ 0	\$ 0	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Grants to School - SOS Reimbursement							\$ 13,350	\$ 26,500	\$ 13,150	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Grants to School - SPS Real Estate Offset							\$ -	\$ 0	\$ 0	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Total Other Income / (Expense)	\$ 24,658,523	\$ 26,650,289	\$ 1,991,767	\$ 24,658,523	\$ 26,650,289	\$ 1,991,767	\$ 1,708,350	\$ 2,064,287	\$ 355,937	\$ 2,000,000	\$ 2,432,648	\$ 432,648	\$ 2,000,000	\$ 2,432,648	\$ 432,648	
Net Surplus / (Deficit)	\$ 940,102	\$ 4,543,791	\$ 3,603,689	\$ 940,102	\$ 4,543,791	\$ 3,603,689	\$ 1,392,323	\$ 461,231	\$ (931,092)	\$ 193,233	\$ 684,960	\$ 491,727	\$ 193,233	\$ 684,960	\$ 491,727	

Summit Public Schools

2016/17 Variance to Budget - SPS Central Office
Through May 31 2017

	SPS Central Office (YTD Rev Budget)	SPS Central Office (YTD Actual)	Variance (\$) F / (U)	Variance (%) F / (U)	SPS Central Office (Prior YTD)	Variance (\$) F / (U)	Variance (%) F / (U)
Revenue							
Principal Apportionment	\$ -	\$ -	\$ -	0.0%	\$ -	\$ -	0.0%
Federal Revenue	\$ -	\$ -	\$ -	0.0%	\$ -	\$ -	0.0%
Other State Revenue	\$ -	\$ -	\$ -	0.0%	\$ -	\$ -	0.0%
Other Local Revenue	\$ -	\$ 7,076	\$ 7,076	0.0%	\$ -	\$ 7,076	100.0%
SPS Support Services	\$ 3,640,343	\$ 3,640,343	\$ -	0.0%	\$ 2,893,128	\$ 747,215	20.5%
Total Revenue	\$ 3,640,343	\$ 3,647,419	\$ 7,076	0.2%	\$ 2,893,128	\$ 754,291	20.7%
Operating Expenses							
Compensation and Benefits	\$ 14,573,445	\$ 13,546,847	\$ 1,026,598	7.0%	\$ 8,152,238	\$ (5,394,609)	-39.8%
Books, Supplies and Technology	\$ 894,240	\$ 1,979,139	\$ (1,084,899)	-121.3%	\$ 318,034	\$ (1,661,105)	-83.9%
Other Operating Expenses	\$ 11,891,078	\$ 10,227,931	\$ 1,663,147	14.0%	\$ 5,702,277	\$ (4,525,654)	-44.2%
SPS Support Services	\$ -	\$ -	\$ -	0.0%	\$ -	\$ -	0.0%
Depreciation	\$ -	\$ -	\$ -		\$ -	\$ -	
Total Operating Expenses	\$ 27,358,763	\$ 25,753,917	\$ 1,604,846	5.9%	\$ 14,172,550	\$ (11,581,367)	-45.0%
Operating Surplus / (Deficit)	\$ (23,718,420)	\$ (22,106,498)	\$ 1,611,922	-6.8%	\$ (11,279,422)	\$ (10,827,077)	49.0%
Other Income / (Expense)							
Parent Fundraising	\$ -	\$ -	\$ -	0.0%	\$ -	\$ -	0.0%
SPS Fundraising	\$ 26,353,523	\$ 28,345,289	\$ 1,991,767	7.6%	\$ 10,909,340	\$ 17,435,950	61.5%
Grants to Schools	\$ (1,695,000)	\$ (1,695,000)	\$ -	0.0%	\$ (1,362,000)	\$ (333,000)	19.6%
Total Other Income / (Expense)	\$ 24,658,523	\$ 26,650,289	\$ 1,991,767	8.1%	\$ 9,547,340	\$ 17,102,950	64.2%
Net Surplus / (Deficit)	\$ 940,102	\$ 4,543,791	\$ 3,603,689	383.3%	\$ (1,732,082)	\$ 6,941,873	152.8%

Summit Public Schools

2016/17 Variance to Budget - California Schools
Through May 31 2017

Revenue	California Schools		California Schools		California Schools		California Schools		California Schools	
	(YTD Oct Budget)		(YTD Actual)		Variance (\$)		Variance (%)		(YTD Actual)	
	F / (U)		F / (U)		F / (U)		F / (U)		F / (U)	
Principal Apportionment	\$ 19,969,047	\$ 19,151,182	\$ 19,151,182	\$ (817,865)	-4.1%	\$ 19,151,182	\$ 15,756,669	\$ 3,394,513	17.7%	
Federal Revenue	\$ 845,502	\$ 377,154	\$ 377,154	\$ (468,348)	-55.4%	\$ 377,154	\$ 835,927	\$ (458,774)	-121.6%	
Other State Revenue	\$ 1,841,471	\$ 2,531,956	\$ 2,531,956	\$ 690,485	37.5%	\$ 2,531,956	\$ 2,489,963	\$ 41,993	1.7%	
Other Local Revenue	\$ 421,760	\$ 577,587	\$ 577,587	\$ 155,827	0.0%	\$ 577,587	\$ 500,669	\$ 76,918	13.3%	
SPS Support Services	\$ -	\$ -	\$ -	\$ -	0.0%	\$ -	\$ -	\$ -	0.0%	
Total Revenue	\$ 23,077,780	\$ 22,637,879	\$ 22,637,879	\$ (439,901)	-1.9%	\$ 22,637,879	\$ 19,583,229	\$ 3,054,650	13.5%	
Operating Expenses										
Compensation and Benefits	\$ 11,849,703	\$ 11,952,103	\$ 11,952,103	\$ (102,400)	-0.9%	\$ 11,952,103	\$ 9,503,414	\$ (2,448,689)	-20.5%	
Books, Supplies and Technology	\$ 3,402,535	\$ 2,760,724	\$ 2,760,724	\$ 641,811	18.9%	\$ 2,760,724	\$ 2,043,986	\$ (716,738)	-26.0%	
Other Operating Expenses	\$ 4,501,225	\$ 5,887,724	\$ 5,887,724	\$ (1,386,499)	-30.8%	\$ 5,887,724	\$ 4,247,283	\$ (1,640,441)	-27.9%	
SPS Support Services	\$ 3,640,343	\$ 3,640,383	\$ 3,640,383	\$ (40)	0.0%	\$ 3,640,383	\$ 2,892,629	\$ (747,755)	-20.5%	
Depreciation	\$ -	\$ -	\$ -	\$ -	0.0%	\$ -	\$ -	\$ -	0.0%	
Total Operating Expenses	\$ 23,393,807	\$ 24,240,935	\$ 24,240,935	\$ (847,128)	-3.6%	\$ 24,240,935	\$ 18,687,311	\$ (5,553,623)	-22.9%	
Operating Surplus / (Deficit)	\$ (316,027)	\$ (1,603,056)	\$ (1,603,056)	\$ (1,287,029)	407.3%	\$ (1,603,056)	\$ 895,917	\$ (2,498,973)	155.9%	
Other Income / (Expense)										
Parent Fundraising	\$ -	\$ 342,786	\$ 342,786	\$ 342,786	0.0%	\$ 342,786	\$ 353,483	\$ (10,697)	-3.1%	
Grants to Schools - Startup	\$ 1,695,000	\$ 1,695,000	\$ 1,695,000	\$ 0	0.0%	\$ 1,695,000	\$ 1,387,000	\$ 308,000	18.2%	
Grants to Schools - 0.25 FTE Teacher Offset	\$ -	\$ 0	\$ 0	\$ 0	0.0%	\$ 0	\$ -	\$ 0	100.0%	
Grants to School - SOS Reimbursement	\$ 13,350	\$ 26,500	\$ 26,500	\$ 13,150	98.5%	\$ 26,500	\$ -	\$ 26,500	100.0%	
Grants to School - SPS Real Estate Offset	\$ -	\$ 0	\$ 0	\$ 0	0.0%	\$ 0	\$ -	\$ 0	100.0%	
Total Other Income / (Expense)	\$ 1,708,350	\$ 2,064,287	\$ 2,064,287	\$ 342,786	20.1%	\$ 2,064,287	\$ 1,740,483	\$ 297,303	14.4%	
Net Surplus / (Deficit)	\$ 1,392,323	\$ 461,231	\$ 461,231	\$ (931,092)	-66.9%	\$ 461,231	\$ 2,636,401	\$ (2,175,170)	-471.6%	

Summit Public Schools

Consolidated CA Balance Sheet

	Month Ended 5/31/2017 (Current Period)	FYE 6/30/2016 (Prior FYE)	Variance (\$) F / (U)
Current Assets			
Cash & Cash Equivalents	\$ 15,206,045	\$ 7,792,823	\$ 7,413,222
Accounts Receivable	\$ 822,263	\$ 3,327,749	\$ (2,505,486)
Prepaid Expenses	\$ 241,081	\$ 938,985	\$ (697,904)
Other Current Assets			\$ -
Total Current Assets	\$ 16,269,389	\$ 12,059,557	\$ 4,209,832
Long-Term Assets			
Furniture, Fixtures & Equipment	\$ 1,434,921	\$ 1,434,921	\$ -
Other Long-Term Assets	\$ 506,424	\$ 257,839	\$ 248,585
Total Long-Term Assets	\$ 1,941,346	\$ 1,692,760	\$ 248,585
Total Assets	\$ 18,210,735	\$ 13,752,318	\$ (4,541,583)
Current Liabilities			
Accounts Payable	\$ 167,115	\$ 453,121	\$ (286,006)
Accrued Accounts Payable	\$ 547,611	\$ 652,973	\$ (105,361)
Other Current Liabilities (Retirement)	\$ (14,158)	\$ 5,827	\$ (19,985)
Total Current Liabilities	\$ 700,568	\$ 1,111,920	\$ (411,352)
Long-Term Liabilities			
CDE Loan	\$ (16)	\$ 84,103	\$ (84,119)
Other Long-Term Liabilities (Other Loans)	\$ -	\$ 100,000	\$ (100,000)
Total Long-Term Liabilities	\$ (16)	\$ 184,103	\$ (184,119)
Total Liabilities	\$ 700,552	\$ 1,296,023	\$ 595,471
Equity			
Retained Surplus / (Deficit)	\$ 12,505,161	\$ 9,711,083	\$ 2,794,078
CY Surplus / (Deficit)	\$ 5,005,022	\$ 2,745,211	\$ 2,259,811
Total Equity	\$ 17,510,182	\$ 12,456,294	\$ 5,053,888
Total Liabilities & Equity	\$ 18,210,735	\$ 13,752,318	\$ (4,458,417)
Cash Balances Detail			
County Authorizer Accounts	\$ 1,314,812	\$ 913,761	\$ (401,050)
Bank of America Checking	\$ 650,785	\$ 6,580,333	\$ 5,929,547
Fidelity Investments	\$ 13,240,448	\$ 298,729	\$ (12,941,719)
Total Cash Balances Detail	\$ 15,206,045	\$ 7,792,823	\$ (7,413,222)

Summit Public Schools Washington

Consolidated Balance Sheet

	Month Ended 5/31/2017 (Current Period)	FYE 8/31/2016 (Prior FYE)	Changes (\$)
Current Assets			
Cash & Cash Equivalents	\$2,124,015	\$1,492,903	\$631,112
Accounts Receivable	\$0	\$1,080	(\$1,080)
Prepaid Expenses	\$127,069	\$522,076	(\$395,007)
Other Current Assets	\$39,375	\$39,375	\$0
Total Current Assets	\$2,290,459	\$2,055,434	\$235,025
Long-Term Assets			
Furniture, Fixtures & Equipment	\$0	\$0	\$0
Other Long-Term Assets	\$0	\$0	\$0
Total Long-Term Assets	\$0	\$0	\$0
Total Assets	\$2,290,459	\$2,055,434	(\$235,025)
Current Liabilities			
Accounts Payable	(\$17,390)	\$8,976	(\$26,366)
Accrued Accounts Payable	\$0	\$350,000	(\$350,000)
Due to Other Government Units	\$131,959	\$0	\$131,959
Payroll Deductions	\$33,322	\$33,409	(\$88)
Total Current Liabilities	\$147,891	\$392,386	(\$244,495)
Long_Term Liabilities			
Other Long-Term Liabilities (Other Loans)	\$0	\$0	\$0
Total Long_Term Liabilities	\$0	\$0	\$0
Total Liabilities	\$147,891	\$392,386	\$244,495
Equity			
Retained Surplus / (Deficit)	\$1,457,608	\$1,324,334	\$133,274
CY Surplus / (Deficit)	\$684,960	\$338,714	\$346,246
Total Equity	\$2,142,568	\$1,663,048	\$479,520
Total Liabilities & Equity	\$2,290,459	\$2,055,434	\$724,015
Cash Balances Detail			
Public Account	\$368,780	\$14,676	\$354,104
Private Account	\$1,755,235	\$1,478,227	\$277,008
Total Cash Balances Detail	\$2,124,015	\$1,492,903	(\$631,112)

Operations Update

Charitable Achievements

Grow by 10x the number of schools, teachers and student engaged in Personalized Learning:

In the Summit Learning Program's (formerly called Summit Basecamp) first year, we set a goal that we would end the year with 10 partner schools implementing Summit Learning. We exceeded that goal. During the 2016-17 school year, we added over a hundred new schools, growing the program by 10x. Currently, there are 132 schools with 20,000 students in 27 states and the District of Columbia participating in the Summit Learning Program. These schools are 70% district schools, 25% charter schools, and 5% independent schools. They include schools with fewer than 100 students as well as schools with more than 4,000 students; schools that are 100% EL and 0% EL; schools with 100% Special Education; and schools in rural counties, urban areas and suburban areas. Summit Learning Program partner schools represent the diversity of the country and are living proof that personalized learning can work for all students and systems. These schools are also renewing at even higher rates than expected; 123 schools have already renewed, exceeding our goal of 120. They are also implementing the three core features of Summit Learning -- project-based learning with teachers assessing on cognitive skills rubric, students self-directing through content and showing competency to progress, and 1:1 mentoring for all students -- at high rates. Currently, 104 schools are implementing all three features, 117 are implementing project-based learning with teachers assessing on cognitive skills rubric, 117 are having students self-direct through content and show competency to progress, and 111 are implementing 1:1 mentoring for all students.

The Summit Learning Program continues to grow in national reach. There are 346 schools planning to participate in the Summit Learning Program next year, with 59,624 students in 40 states. These schools continue to be diverse. Based on state definitions of 'low,' 'medium,' and 'high' rates relative to other schools, here are the demographics for these schools: for special education, 44% have a high rate, 44% medium, 12% low; for English Learners, 44% high (over 25% of this group majority EL), 10% medium, 48% low; and, for free and reduced price lunch: 52% high, 23% medium, 25% low.

Improve the tools enabling Personalized Learning:

So far in 2017, we have been able to improve tools enabling personalized learning by working with academics, technologists and, most importantly, practitioners, to develop resources and supports for the facilitation of high-quality personalized learning. Specifically, we have:

- Improved features in the Personalized Learning Platform including a mentoring dashboard that allows students to make weekly learning plans aligned with their long-term goals, enhance those plans using research-based learning strategies, and then track progress towards completion of those plans. The mentor had access to valuable information about student progress for the purposes of support and intervention. Additionally, we've built features supporting students' development of academic mindsets such as growth mindset and self-efficacy, and we're currently working on features that enable greater self-directed learning behaviors by using findings from SRI and working with world-class researchers, particularly social psychologists and

behavioral economists.

- Improved curricula and assessments available to all Summit Learning Program teachers and students. Projects have been revised to increasingly rigorous authoring standards, and this improvement will continue into the 2017-18 school year. Additionally, we have conducted, and continue to conduct, research to best understand what supports teachers need regarding curriculum and assessment in order to effectively implement a project-based program, and are building these resources (course and project overviews aimed at teacher implementation) to support successful instruction in personalized learning environments. This curriculum and assessment improvement is ongoing, and is becoming increasingly responsive to the needs of local communities to enable greater quality and adaptability of curriculum in all schooling contexts within the Summit Learning Program.
- Improved data dashboards available to various stakeholders. One of the most compelling advantages of personalized learning is the wealth of student data available to educators. We have improved data dashboards for students, teachers, mentors, and teacher coaches to make student and educator growth more actionable and timely.
- Built a personalized learning teacher credentialing program to support Summit schools, and others, in building diverse pipelines into teaching. Working with the Stanford Center for Assessment, Learning, and Equity (SCALE), we have developed a personalized learning teacher residency and have gained institutional accreditation from the California Teaching Commission (CTC). We have gained program accreditation and have recruited our first class of teacher candidates to support the growth and successful implementation of personalized learning at Summit schools and schools in the Summit Learning Program. Our initial class of teacher candidates is over 60% teachers of color and over 40% male. We are now finalizing a university partnership to enable program scale and sustainability.
- Improved, and made more effective and efficient, training based on research about a school's journey into Summit Learning.
- Improved, and made more effective and efficient, coaching (in-person and online) based on research about the "jagged profiles" of Summit Learning schools, so that the dimensions of a school that really matter for program implementation are the ones we most rapidly collect data on and target support towards.

Develop regional capacity to engage and support Personalized Learning environments:

The growing national demand for Summit Learning continues to attract compelling regional partners, and we are actively building on that interest to support recruitment and training of schools.

We know that it is critical for other organizations to become advocates for Summit Learning; before committing, 77% of the schools that joined Cohort 3 - over 180 schools - spoke with a trusted source who encouraged them to join the Summit Learning Program. For this reason, we are hosting 14 regional Summer Trainings across the country, including in Little Rock, Providence, Newark, Denver, Colorado and Chicago. At multiple of these Summer Trainings, a regional host will welcome us to their own campus or facility for training. Additionally, we are building energy and excitement within our Summit Learning Community. This summer, 55 educators from our Summit Learning partner schools have signed up to travel across the country to train teachers in implementing Summit Learning. There was so much demand that we had to turn away hundreds of applicants.

To build on the momentum, we will launch a series of Jeffersonian dinners hosted in each of these regional cities. Diane Tavenner and members of the CZI team will bring together leaders in each region to imagine what the future will look like for schools and invite thought leaders into our guiding coalition. We anticipate that increased advocates will lead to a stronger and more cohesive ecosystem.

Additionally, this year we launched a yearlong coaching pilot that will enable at least 13 organizations to eventually become certified Summit Learning coaches. Our theory is that third party organizations will want to provide additional coaching and support to schools engaging in Summit Learning and that they can eventually provide these supports to schools within their regions and enable greater scale of Summit Learning. All of these organizations will receive individualized training during the summer, participate in Summer Training with their schools and be mentored by a coach on the Summit Learning Program team.

Build a body of evidence demonstrating the efficacy of Personalized Learning:

Personalized Learning is not an inherently new way of educating students; rather, it is the collection of best practices designed to take advantage of new technologies, thereby allowing teachers and school leaders to implement existing research-based instruction. Formative assessment, a focus on skills development, increased student agency, structures designed to enable productive academic mindsets, differentiation, competency-based learning, dedicated mentoring that bridges students' "multiple worlds" -- these are well-evidenced practices that are enabled by and required of Summit Learning educators. Still, we want to ensure that we are responsibly operationalizing these best practices in various contexts as we scale. To that end, we are working with the following groups to approach efficacy from different angles:

- Later this summer we will be releasing *The Science of Summit*, a document that explains the research behind the Summit Learning model. One goal of the publication is to begin conversations of efficacy with a common language and on a solid foundation. The document details the design choices Summit has made to bring guiding principles, rooted in academic research, to life in Summit Learning schools.
- FSG, a mission-driven consulting firm, is conducting a largely qualitative study of Summit Learning Program schools to understand what are the accelerators, and the barriers to scale, the contextual features that matter most when implementing personalized learning, and how diverse learners are experiencing various Summit Learning Program implementations. Based on the work FSG did with us this year, we've expanded the scope to include more schools and deeper analyses of implementation features in the 2017-18 school year. This research has driven, and will continue to drive, significant changes in our mentoring, training, data analysis, and platform approaches. Doing more with less, particularly in the training and mentoring programs, is one of the primary goals of this work.
- Research center SRI is conducting a largely quantitative study of Summit Schools and Summit Learning Program schools to examine efficacy through the lens of different student groups, and to collect data to understand a central hypothesis: personalized learning may not immediately impact traditional measures of student success (e.g. assessments such as NWEA MAP, PARCC/SBAC), but it does begin to positively shift students' academic mindsets, emotional intelligence, and sense of agency--what we refer to as habits of success. The 2016-17 school year with SRI yielded the most compelling and actionable results yet, and we made prioritization decisions for curriculum, assessment, and platform features as a result, and we hope to conduct even more targeted work in 2017-18.

- The ACT Research Group is working with us to follow a group of our graduates into college to better understand the phenomenon of 'summer melt,' in which college-bound graduates ultimately do not enroll in college. We are hoping to extend this involvement to support a better understanding of efficacy beyond our schools and into college and work.
- The Stanford Center for Assessment, Learning, and Equity (SCALE) conducted an efficacy study of our project-based curriculum and we have since made significant improvements based on their recommendations. Though this report is largely qualitative and focused solely on the interaction between curriculum and instruction, it includes statements such as, "by surfacing the cognitive work that allows students to develop content understandings and perform complex academic tasks, Summit breaks the traditional schooling pattern of presenting content and expecting students to bring the relevant skills to the table—a model that is still prevalent in many colleges and universities and for which Summit students are more likely to be prepared because of the work Summit does with teaching cognitive skills."

Create the societal conditions that will enable accelerated adoption of Personalized Learning:

We believe deeply that there must be sustained community demand for personalized learning in order to create the societal conditions that will allow it to have widespread adoption. Over the past year, we have dedicated our collective efforts to building the foundation for community demand and, more specifically, an awareness of what personalized learning is and its positive impact on students, families and communities.

We started by developing a strong brand and public message for personalized learning. This work has included hiring Summit's first marketing and content marketing teams, developing a dynamic Summit Learning brand and identity, launching a new Summit Learning website - which is serving as the "go to" site to learn about personalized learning - launching digital marketing campaigns to drive awareness of personalized learning, leveraging conferences, convening's and events to spread our message and recruit more schools and teachers, and lastly, telling the story of our Summit Learning schools nationally through the media.

While this foundational work has been critical to softening the ground for the community building we are deeply engaged in, our ultimate goal moving forward is to not only build awareness of personalized learning across the nation, but to transform our own growing Summit Learning community (now 340+ schools, 2,700+ teachers and 58,000+ students) into true advocates and evangelists.

Over the past few months, Summit teams have been intensely engaged in a collaborative effort to write and produce the "*Science of Summit*," the first of several publications to be released that provides a detailed overview of the elements of Summit Learning. It reviews the research base underlying the guiding principles and design choices we've made at Summit Public Schools. Future publications will describe Summit Learning design choices and adaptations in local communities across the country.

Our ultimate goal is for the Summit Learning community to be able to confidently and accurately answer the question, "Does Summit Learning work?" We will drive one consistent narrative for the next year within our existing Summit Learning community and provide the opportunity for the community to feel ownership of Summit Learning, and engage on a deeper level with it.

The “*Science of Summit*” will be released in August 2017 and will mark the start of a robust, year-long campaign, which will include the launch and promotion of the following:

- *In-depth blog series:* In 16-20 posts, we will introduce the Summit Learning community to each element of the “*Science of Summit*,” including the research base that supports the Summit Learning model and our Outcomes, Guiding Principles, and Design Choices. Posts will be personal, and inclusive of interviews with researchers, school leaders, teachers, and students. These will be published on our forthcoming Summit Learning blog (which launches on June 30th).
- *Podcast series:* The Summit Learning podcast launches in September, kicking off with five episodes released monthly and focusing on Summit Learning Outcomes and the research that backs them. This five-episode mini-series features learning scientists, standout students, inspiring educators, and Summit team members introducing listeners to the key tenets of personalized learning while infusing Summit Learning implementation stories and concepts into the mix.
- *Facebook Live series:* Our Facebook Live presence launches at Summer Training in July, but will really ramp up with five (5) highly organized episodes for the “*Science of Summit*.” These episodes will bring our research to life via a TV-programming-style format, in which we interact with multiple guests (researchers, teachers, principals, students, parents, Summit teammates) each month around a specific theme and see live-action footage right from the classroom (presentations, projects, mentorship sessions, etc.).
- *Additional assets:* To support our expansive campaign to introduce the “*Science of Summit*” to all priority audiences, we will produce a suite of collateral that includes a conference-ready brochure, presentation slides for insertion in larger Summit Learning keynotes, extensive infographics focused on Outcomes and Science of Summit overall, and slideshows for conference keynotes (one for a researcher audience and the other for a teacher/school leader audience).

Additionally, since December 2016, Summit has released three volumes of our Research Roundup publication (December, April, and June), which enables us to internally communicate groundbreaking mid-term research with key partners that include:

- *Research groups:* SRI International, FSG, the Harvard Center for Education Policy Research, Columbia Center for Public Research and Leadership (CPRL), Stanford Center for Assessment, Learning, and Equity (SCALE);
- *Learning networks:* Building Equitable Learning Environments, Student Agency Improvement Community, and the Assessment for Learning Project, Carnegie Student Agency Improvement Community (SAIC); and
- *Leading researchers:* Angela Duckworth, Todd Rose, Brooke Stafford-Brizard, Camille Farrington, Todd Rogers, Dave Paunesku, CASEL, David Yeager, and Chris Hulleman.

For the coming year of publications (September, December, March, June), we will not only produce the internal report, but will also launch a quarterly external report along with supporting multimedia content, including blog posts, podcasts, and potentially video. We aim to produce a research center on the Summit Learning website at the conclusion of this year to further drive home the rigor of our research. This portal will become the central location to find all mid-term and long-term studies and findings coming out the R&D team, supporting the message that Summit Learning’s work is evidence-based and research-grounded.

And lastly, to further support the growth of the Summit Learning community and awareness of personalized learning as a whole, especially among school leaders, teachers, parents, and education thought leaders, we are in the process of launching a multi-channel content marketing strategy that will include the launch of the Summit Learning blog in June, Facebook Live presence in July, and podcast in September. Furthermore, we will build trust and advocacy among our audiences by engaging with key influencers who they respect and turn to for insights and opinions. New channels and content will include:

- *Blog Content:* Extensive coverage of all aspects of Summit Learning, created for priority audiences; 12 posts published monthly. Key content categories include:
 - *News:* Developments and updates from Summit Learning.
 - *Student Voices:* Stories told by and about Summit Learning students across the country.
 - *Educator Resources:* Tools and best practices for Summit Learning school leaders and teachers.
 - *Summit Families:* Resources for families with students in Summit Learning schools.
 - *Summit in Action:* See implementation in action at these featured schools, come away with ideas for your school.
 - *Research & Insights:* Evidence-based best practices and actionable insights.
 - *Innovation in Education:* Thought leadership and related innovations from the K-12 education community.
- *Facebook Live series:* A monthly Facebook Live interview series focused on making Summit Learning's message and vision personal, inspiring, and informative. A typical Facebook Live interview session will be staged on-the-ground at a Summit Learning partner school or related event/location, centered around the key themes for the month. Broadcasts will utilize a TV-programming-style format in which we interact with multiple guests (teachers, principals, students, parents, researchers) around a specific theme and see action footage from the classroom (presentations, projects, mentorship sessions, etc.).
- *Summit Learning podcast:* A monthly radio-style podcast series featuring multiple guests (teachers, principals, students, parents, researchers) per episode, focused around a specific theme. We will launch our educational/inspirational interview series podcast in September.
- *Influencer Engagement:* Collaborations with key influencers, researchers, and thought-leaders to create or co-create content. This includes podcast, Facebook Live, video, and blog content. We aim to publish (or obtain rights to republish) relevant content related to the themes we know our community cares about (via market research) - getting directly to their mindsets and beliefs.

We have also continued to form partnerships across the country with experts in change-leadership, most recently with Kotter International. Included in the partnership are Todd Rose and the Center for Individual Opportunity, NewSchools Venture Fund, Chiefs for Change and Summit Public Schools. Together we are working to define The Big Opportunity (TBO) which is a key first step in leading large scale change. The work includes drafting a vision, outlining potential strategies, convening a diverse set of leaders and coming to consensus on a compelling opportunity that will drive change.

Developing and Strengthening Internal Operations and Administration

As we shared in the November report, as our vision evolved to include the Summit Learning Program, we developed an organizational strategy to realize that vision, as well as an aligned organizational structure. As we continue to learn from the implementation of the Summit learning program, we continue to iterate on our strategies and structure.

We are currently partnering with CZI through the transition of the Summit Learning Platform engineering team from Facebook to CZI. Given CZI's commitment to personalized learning, and focus on pairing world-class engineers with innovative leaders in science and education, we see tremendous potential in this partnership. We are also working with CZI to transition the work of recruiting new schools to the Summit Learning Program. This transition represents an opportunity for our partnership to bring expertise in sales to bear on our collective work and allows Summit to focus on leveraging its core competencies: translating theory to practice through the operation of schools that serve as proof points for the field, supporting new and returning Summit Learning Program schools, and pushing the boundaries of what is possible in education, and developing the tools and resources that power Summit Learning.

Optimization has also become a core strategic focus. Supporting schools in the Summit Learning Program is currently expensive because we are addressing gaps in the Platform and the field. We expect to decrease support over time by learning from the current gaps and building them into the Platform, while improving the ecosystem. Training for schools in the Summit Learning Program is also expensive because we pay staff to facilitate our trainings and we pay for participants to attend. We currently have a team devoted to reducing the number of staff required over time and enabling training to happen locally.

We also continue to enhance our internal operations and organizational capacity. This year, we worked with Bellwether Education Partners to assess Summit's current state around diversity, equity, and inclusion and to develop a vision, strategy, and implementation plan. We are also implementing systems to improve internal communication, project management, and resource sharing, and we are implementing enhanced security measures.



**Summit Public Schools Interim Report
November 2016**

Grant Overview

Organization name:	Summit Public Schools
Contact name, email, and phone #:	Diane Tavenner dtavenner@summitps.org [REDACTED]
Date of report:	November 30, 2016
Grant period:	July 1, 2016 - June 30, 2017
Grant amount:	\$20,000,000
Grant title:	Summit Public Schools
Grant purpose:	Scale Personalized Learning Nationally

Financial Update

The enclosed reports include:

- Central Office Budget vs. Actuals July 1 - Sept 30, 2016
- CA Schools Budget vs. Actuals July 1 - Sept 30, 2016
- WA Schools Budget vs. Actuals Sept 1 - Sept 30, 2016
- CA Balance Sheet Sept 30, 2016

Report Summary:

At this point in the year, all entities are running on budget. Notable variances:

- Central Office
 - Net Surplus Variance: \$10M
 - Revenue
 - \$10M philanthropy deposited before schedule
 - Expenses
 - 4000 Supplies
 - Increase of \$700K - timing of Basecamp expenses
 - 5000 Other Operating
 - Increase of \$1.8M - Denali facilities expenses (offset by philanthropy)
 - Decrease of \$2M - timing of Basecamp expenses
- CA School Sites:
 - Net Surplus Variance: \$230K
 - All variances are issues of timing
- WA School Sites
 - Note this is only one month into the school year. Budget is on track.
- Balance Sheet
 - Cash: \$10M
 - Total Equity (Fund Balance) \$14M

Summit Public Schools

2016/17 Variance to Budget - SPS Central Office

Through Sept 30, 2016

	SPS Central Office (YTD Budget)	SPS Central Office (YTD Actual)	Variance (\$) F / (U)	Variance (%) F / (U)	SPS Central Office (YTD Actual)	SPS Central Office (Prior YTD)	Variance (\$) F / (U)	Variance (%) F / (U)	Comments
Revenue									
Principal Apportionment	\$0	\$0	\$0	0.0%	\$0	\$0	\$0	0.0%	
Federal Revenue	0	0	0	0.0%	0	0	0	0.0%	
Other State Revenue	0	0	0	0.0%	0	0	0	0.0%	
Other Local Revenue	0	1	1	0.0%	1	0	1	100.0%	
SPS Support Services	0	0	0	0.0%	0	0	0	0.0%	
Total Revenue	\$0	\$1	\$1	0.0%	\$1	\$0	\$1	100.0%	
Operating Expenses									
Compensation and Benefits	\$3,364,090	\$3,364,349	\$499,742	12.9%	\$3,364,349	\$2,394,628	(\$969,721)	-28.8%	Basecamp convening costs, Central office furniture costs timing early in year
Books, Supplies and Technology	258,134	1,002,120	(743,987)	-288.2%	1,002,120	217,313	(784,802)	-78.3%	Additional operating expenses due to Basecamp partner travel, Central office buildout. \$1.8M
Other Operating Expenses	5,197,992	5,413,883	(215,891)	-4.2%	5,413,883	2,508,630	(2,905,253)	-53.7%	Denali facility expense to be charged back to Denali over time
SPS Support Services	0	0	0	0.0%	0	0	0	0.0%	
Depreciation	0	0	0	0.0%	0	0	0	0.0%	
Total Operating Expenses	\$9,320,216	\$9,780,352	(\$460,136)	-4.9%	\$9,780,352	\$5,120,575	(\$4,659,777)	-47.6%	
Operating Surplus / (Deficit)	(\$9,320,216)	(\$9,780,351)	(\$460,135)	4.9%	(\$9,780,351)	(\$5,120,575)	(\$4,659,776)	47.6%	
Other Income / (Expense)									
Parent Fundraising	\$0	\$0	\$0	0.0%	\$0	\$0	\$0	0.0%	
SPS Fundraising	282,469	10,751,723	10,469,254	3706.3%	10,751,723	4,390,643	6,361,080	59.2%	10M CZI grant (10M additional to come in Nov)
Grants to Schools	0	0	0	0.0%	0	0	0	0.0%	
Total Other Income / (Expense)	\$282,469	\$10,751,723	\$10,469,254	3706.3%	\$10,751,723	\$4,390,643	\$6,361,080	59.2%	
Net Surplus / (Deficit)	(\$9,037,747)	\$971,373	\$10,009,120	-110.7%	\$971,373	(\$729,932)	\$1,701,304	175.1%	
	ties 10-14	ties 10-14	ties 10-14			ties 10-14			

Summit Public Schools

2016/17 Variance to Budget - California Schools
Through Sept 30, 2016

	California Schools (YTD Budget)	California Schools (YTD Actual)	Variance (\$) F / (U)	Variance (%) F / (U)	California Schools (YTD Actual)	California Schools (Prior YTD)	Variance (\$) F / (U)	Variance (%) F / (U)	Comments
Revenue									
Principal Apportionment	\$5,449,132	\$2,976,111	(\$473,021)	-13.7%	\$2,976,111	\$2,790,709	\$185,402	6.2%	
Federal Revenue	\$55,550	\$4,314	(\$1,236)	-92.2%	4,314	0	4,314	100.0%	
Other State Revenue	\$55,823	\$156,436	100,613	180.2%	156,436	\$6,969	99,468	63.6%	State SPED monies ahead of schedule
Other Local Revenue	47,753	117,434	69,681	145.9%	117,434	30,498	86,936	74.0%	
SPS Support Services			0	0.0%	0		0	0.0%	
Total Revenue	\$3,608,258	\$3,254,295	(\$353,963)	-9.8%	\$3,254,295	\$2,878,176	\$376,119	11.6%	
Operating Expenses									
Compensation and Benefits	\$2,748,731	\$2,632,328	\$116,404	4.2%	\$2,632,328	\$2,129,407	(\$502,921)	-19.1%	
Books, Supplies and Technology	1,681,529	1,470,989	210,540	12.5%	1,470,989	1,139,099	(331,889)	-22.6%	
Other Operating Expenses	1,629,099	1,443,473	185,626	11.4%	1,443,473	861,959	(581,514)	-40.3%	Adopted budget doesn't include Shasta / Denali facility development updated costs
SPS Support Services	0	0	0	0.0%	0	0	0	0.0%	
Depreciation			0	0.0%			0	0.0%	
Total Operating Expenses	\$6,059,359	\$5,546,789	\$512,570	8.5%	\$5,546,789	\$4,130,465	(\$1,416,325)	-25.5%	
Operating Surplus / (Deficit)	(\$2,451,101)	(\$2,292,494)	\$158,607	-6.5%	(\$2,292,494)	(\$1,252,289)	(\$1,040,205)	45.4%	
Other Income / (Expense)									
Parent Fundraising	\$0	\$45,105	\$45,105	0.0%	\$45,105	\$20,606	\$24,499	54.3%	
Grants to Schools - Startup	\$1,695,000	\$1,695,000	0	0.0%	1,695,000	\$1,362,000	333,000	19.6%	
Grants to Schools - 0.25 FTE Teacher Offs	\$0	\$0	0	0.0%	0	0	0	100.0%	
Grants to School - SOS Reimbursement	\$0	\$26,500	26,500	0.0%	26,500	0	26,500	100.0%	
Grants to School - SPS Real Estate Offset	\$0	0	0	0.0%	0	0	0	0.0%	
Total Other Income / (Expense)	\$1,695,000	\$1,766,606	\$45,106	2.7%	\$1,740,106	\$1,382,606	\$357,499	20.5%	
Net Surplus / (Deficit)	(\$756,101)	(\$525,888)	\$230,213	-30.4%	(\$552,389)	\$130,317	(\$682,706)	123.6%	
	ties 10-14	ties 10-14				ties 10-14			
Key Metrics									
Enrollment	2,684	2,664	(20)	-0.7%	2,664		2,664	100.0%	Actual forecast Enrollment as of 9-30-16 count

Summit Public Schools

2016/17 Variance to Budget - Washington
Through September 30, 2016

	Washington All (YTD Actuals)	Washington All (BUDGET)	Variance (\$) F / (U)	Variance (%) F / (U)	Comments
Revenue					
Principal Apportionment	\$0	\$2,857,763	\$2,857,763	0.0%	First state monies deposited in October
Federal Revenue	\$0	\$263,967	263,967	0.0%	
Other State Revenue	\$0	\$754,164	754,164	0.0%	
Other Local Revenue	\$1,225	\$0	(1,225)	-100.0%	
SPS Support Services	\$0	\$0	0	0.0%	
Total Revenue	\$1,225	\$3,875,894	\$3,874,669	316299.5%	
Operating Expenses					
Compensation and Benefits	\$427,162	\$2,527,180	(\$2,100,018)	-491.6%	17%
Books, Supplies and Technology	301,539	5514,480	(2112,941)	-70.6%	Large Expenses: Tech: \$184k (budget of approx \$210k) Furniture: \$78k Expeditions (\$75k), Student recruiting (\$17k)
Other Operating Expenses	346,831	\$2,154,709	(1,807,878)	-521.3%	
SPS Support Services	0	\$740,000	(740,000)	0.0%	
Total Operating Expenses	\$1,075,533	\$5,936,369	(\$4,860,837)	-451.9%	
Operating Surplus / (Deficit)	(\$1,074,308)	(\$2,060,475)	(\$986,168)	91.8%	
Other Income / (Expense)					
Parent Fundraising	\$0	\$0	\$0	0.0%	Awaiting next Gates payment (anticipated in Dec / Jan)
SPS Fundraising	0	\$2,235,390	2,235,390	0.0%	
Grants to Schools	0	\$0	0	0.0%	
Total Other Income / (Expense)	\$0	\$2,235,390	\$2,235,390	0.0%	
Net Surplus / (Deficit)	(\$1,074,308)	\$174,915	\$1,249,222	-116.3%	

Key Metrics

Enrollment	184	350	166	90.2%
Free & Reduced Lunch %	65%	58%	-7%	-10.8%
Special Education %	22%	12%	-10%	-44.8%

Summit Public Schools
Consolidated Balance Sheet

	Month Ended 9/30/2016 (Current Period)	FYE 6/30/2016 (Prior FYE)	Variance (\$) F / (U)	Comments
Current Assets				
Cash & Cash Equivalents	\$10,480,737	\$7,792,823	\$2,687,914	
Accounts Receivable	1,610,839	3,327,749	(1,716,910)	
Prepaid Expenses	0	938,985	(938,985)	
Other Current Assets			0	
Total Current Assets	\$12,091,575	\$12,059,557	\$32,018	
Long-Term Assets				
Furniture, Fixtures & Equipment	\$1,434,921	\$1,434,921	\$0	
Other Long-Term Assets	310,599	257,839	\$52,760	
Total Long-Term Assets	\$1,745,521	\$1,692,760	\$52,760	
Total Assets	\$13,837,096	\$13,752,318	(\$84,779)	
Current Liabilities				
Accounts Payable	\$88,321	\$453,121	(\$364,800)	
Accrued Accounts Payable	621,101	652,973	(31,872)	
Other Current Liabilities (Retirement)	6816	5827	989	
Total Current Liabilities	\$716,237	\$1,111,920	(\$395,683)	
Long-Term Liabilities				
CDE Loan	\$70,215	\$84,103	(\$13,888)	
Other Long-Term Liabilities (Other Loans)	100,000	100,000	0	
Total Long-Term Liabilities	\$170,215	\$184,103	(\$13,888)	
Total Liabilities	\$886,452	\$1,296,023	\$409,571	
Equity				
Retained Surplus / (Deficit)	\$12,505,161	\$9,711,083	\$2,794,078	
CY Surplus / (Deficit)	445,483	\$2,745,211	(2,299,728)	
Total Equity	\$12,950,644	\$12,456,294	\$494,350	
Total Liabilities & Equity	\$13,837,096	\$13,752,318	(\$84,779)	
Cash Balances Detail				
County Authorizer Accounts	\$1,341,692	\$913,761	(\$427,930)	
Bank of America Checking	8,315,265	6,580,333	(1,734,932)	
Fidelity Investments	833,780	298,729	(535,051)	
Total Cash Balances Detail	\$10,480,737	\$7,792,823	(\$2,687,914)	

CSGF Loan just received April 2016

CZI grant received
1.7M in A/R collected in July-Sept - state aid, in lieu, state funding

Operations Update

Charitable Achievements

Grow by 10x the number of schools, teachers and student engaged in Personalized Learning:

In Summit Basecamp's first year, we set a goal that we would end the year with 10 partner schools implementing Summit Learning. We exceeded that goal. This year, we added over a hundred new schools, growing the program by 10x. Currently, there are 132 schools with 20,000 students in 27 states and the District of Columbia participating in Summit Basecamp. These schools are 70% district schools, 25% charter schools, and 5% independent schools. They include schools with fewer than 100 students as well as schools with more than 4,000 students; schools that are 100% EL and 0% EL; schools with 100% Special Education; and schools in rural counties, urban areas and suburban areas. Summit Basecamp partner schools represent the diversity of the country and are living proof that personalized learning can work for all students and systems.

Improve the tools enabling Personalized Learning:

So far in 2016, we have been able to improve tools enabling personalized learning by working with academics, technologists and, most importantly, practitioners, to develop resources and supports for the facilitation of high-quality personalized learning. Specifically, we have:

- Improved features in the Personalized Learning Platform including a project-based learning feature set that offers students more frequent, actionable feedback on their progress, a set of dashboards to help teachers and teacher coaches effectively target interventions with students, and a suite of features to allow mentors to provide students with feedback on their habits of success, or non-cognitive skills.
- Improved curricula and assessments available to all Basecamp teachers and students. Projects have been revised to increasingly rigorous authoring standards, and this improvement continues throughout the remainder of the 16-17 school year. Additionally, we have conducted research to best understand what supports teachers need regarding curriculum and assessment in order to effectively implement a project-based program, and are building these resources (course and project overviews aimed at teacher implementation) to support successful instruction in personalized learning environments.
- Improved data dashboards available to various stakeholders. One of the most compelling advantages of personalized learning is the wealth of student data available to educators. We have improved data dashboards for students, teachers, mentors, and teacher coaches to make student and educator growth more actionable and timely.
- Built a personalized learning teacher credentialing program to support Summit schools, and others, in building diverse pipelines into teaching. Working with the Stanford Center for Assessment, Learning, and Equity (SCALE), we have developed a personalized learning teacher residency and have gained institutional accreditation from the California Teaching Commission (CTC). We are in the final stages of program accreditation and are recruiting our first class of teacher candidates to support the growth and successful implementation of personalized learning at Summit and in Basecamp.

Develop regional capacity to engage and support Personalized Learning environments:

We currently have 11 regions and expect to expand to 15 regions in the 2017-2018 school year. In our 11 regions, we have over 73 organizations recruiting schools to join the Summit Learning Community. Organizations range from non-profits to for-profits at the district, county and state

level. For instance, In Pennsylvania, Intermediate Unit 08's Executive Director has now presented to the 20 districts within his purview and is working on building a coalition of Intermediate Units across the state. In Arkansas, the Arkansas Public School Resource Center has featured Summit Learning at their local conferences through presentations and learning opportunities. Our collective efforts have resulted in commitments from more than 25 schools to apply for Summit Learning in Arkansas. Additionally, Arkansas Public Schools Resource Center is training 12 coaches to provide training and support for the Arkansas schools.

Looking forward to this summer, we will now also provide Summer Training in 15 cities across the country. Each training will be co-hosted by at least one regional partner that draws credibility from their community. Additionally, each training will be facilitated by certified Summit Learning facilitators from Summit Public Schools, schools in the Summer Learning program and regional partners.

Build a body of evidence demonstrating the efficacy of Personalized Learning:

Personalized learning is not an inherently new way of educating students; rather, it is the collection of best practices designed to take advantage of new technologies, thereby allowing teachers and school leaders to implement existing research-based instruction. Formative assessment, a focus on skills development, increased student agency, structures designed to enable productive academic mindsets, differentiation, competency-based learning, dedicated mentoring that bridges students' "multiple worlds"--these are well-evidenced practices that are enabled by and required of Summit and Basecamp educators. Still, we want to ensure that we are responsibly operationalizing these best practices in various contexts as we scale. To that end, we are working with the following groups to approach efficacy from different angles:

- FSG, a mission-driven consulting firm, is conducting a largely qualitative study of Basecamp schools to understand what are the accelerators, and the barriers to scale, the contextual features that matter most when implementing personalized learning, and how diverse learners are experiencing various Basecamp implementations.
- Research center SRI is conducting a largely quantitative study of Basecamp and Summit schools to examine efficacy through the lens of different student groups, and to collect data to understand a central hypothesis: personalized learning may not immediately impact traditional measures of student success (e.g. assessments such as NWEA MAP, PARCC/SBAC), but it does begin to positively shift students' academic mindsets, emotional intelligence, and sense of agency--what we refer to as habits of success.
- The Center for Education Policy Research (CEPR) at Harvard is in the planning year of a random control trial that we hope will serve as a deep-dive on these habits of success: which are most important for students' success, which we are instilling most effectively through the Basecamp program, and which we still need to work with practitioners, researchers, and technologists to most effectively develop in students and educators at scale.
- The Stanford Center for Assessment, Learning, and Equity (SCALE) conducted an efficacy study of our project-based curriculum and we have since made significant improvements based on their recommendations. Though this report is largely qualitative and focused solely on the interaction between curriculum and instruction, it includes statements such as, "by surfacing the cognitive work that allows students to develop content understandings and perform complex academic tasks, Summit breaks the traditional schooling pattern of presenting content and expecting students to bring the relevant skills to the table—a model that is still prevalent in many colleges and universities and for which Summit students are more likely to be prepared because of the work Summit does with teaching cognitive skills."

Create the societal conditions that will enable accelerated adoption of Personalized Learning:

We believe deeply that there must be sustained community demand – which includes K-12 teachers and school leaders, students, parents, policymakers, colleges and employers – for personalized learning in order to create the societal conditions that will allow it to have widespread adoption. To achieve sustained public demand, we are focusing on four key societal elements:

1. People are convinced that their school(s) should be doing Summit Learning.
2. People believe Summit Learning is attainable for themselves.
3. Being an Summit Learning graduate is a competitive advantage for acceptance to Top 50 colleges.
4. Being a Summit Learning graduate is a competitive advantage for hiring by America's top 100 employers.

In the last six months, we have dedicated our collective efforts to building the foundation of the first key element. More specifically, for people to be convinced that their school should be a personalized learning environment, they must have an awareness of what personalized learning is and its positive impact on students, families and communities.

Therefore, we have focused on developing a strong brand and public message for personalized learning, designing immersive experiences to engage key stakeholders in personalized learning, and creating compelling examples of what personalized learning is.

This work has included hiring Summit's first marketing team, developing a dynamic Summit Learning brand and identity, gearing up to launch a new www.summitlearning.org website (which will ultimately serve as the “go to” site to learn about personalized learning), launching digital marketing campaigns to drive awareness of personalized learning, leveraging conferences, convening's and events to spread our message and recruit more schools and teachers, and lastly, telling the story of our Summit Learning schools nationally through the media.

We have also worked closely with our partners across the country in their efforts to galvanize and build momentum for personalized learning. This has included supporting the 180 Project, both by serving as a member of its guiding coalition as well as being one of the first six stories it will share this coming winter. We have also joined Education Reimagined and it's community of practice, forming a sub-committee focused on community demand for personalized learning.

Additionally, we have designed an initial set of tools that enable us to facilitate immersive experiences where participants explore the “why” behind personalized learning. This is part of the joint work we are doing with Todd Rose (and the Center for Individual Opportunity) to connect the science of individuality with K-12 education, and ultimately personalized learning. To date, we've prototyped an immersive experience with leading Silicon Valley CEOs, and in December, will lead a group of California policymakers through an experience.

Developing and Strengthening Internal Operations and Administration

Since our founding, our vision has steadily evolved. Today, we are not only an organization operating 10 successful schools serving 3,100 students in California and Washington State.

This year, we are operating those 10 schools alongside Summit Basecamp, a free program that is now enabling over 20,000 students in 100 public schools and districts across the country to bring personalized learning into their classrooms. Our vision is that every single individual in the United States, upon reaching adulthood, is equipped with the skills, knowledge, and habits to realize their unique and full human potential, enabling them to be contributing members of society.

To realize our vision, we recognized the need to develop a strategy to get there, and the need to align our organizational structure to that strategy. Over the last 6 months, we have developed this strategy, implemented a reorganized structure, and reallocated and added human resources. Our new structure is strategically aligned to address our organization's strategic needs given our new national vision. While previously teams had a functional purpose (e.g. Technology, Academics, Info, etc.), each team is now responsible for a core strategic objective, such as: operate a network of high-performing personalized learning schools; or, enable teachers, schools, and community-based and national partners to foster personalized learning environments. Already, this structure has clarified ownership of responsibilities and core strategic objectives, and ensured that the right resources are available to the leaders who need them in order to effectively lead towards each core objective. Details on this new structure are in the attachments. To develop our strategy, we have used a Theory of Action framework, which includes a set of if/then statements that connect specific, measureable drivers to our ultimate aim. We are also developing a set of measures and metrics that connect to these drivers and allow us to effectively measure both our progress to our intended objectives as well as the value of each set of work or assumption in contributing to our objectives. A high level overview of this framework is in the attachments.

ATTACHMENTS



Theory of Action

Summit Public Schools has developed a theory of action to connect specific, measureable drivers to our vision and aim.

The table on the next page shows the highest two levels of these drivers (primary and secondary drivers). All of these drivers do extend many levels deeper, and while they are complete, we are currently working on a visualization solution.

We are sharing a high level version now, but a full view of these drivers should be available in the next week.

Primary Drivers

Summit schools are proof points, models, and incubators of Summit Personalized Learning environments

Lots of schools across the US become Summit Personalized Learning environments

Vision

Every single US individual upon reaching adulthood is equipped with the skills, knowledge, and habits to realize their unique and full human potential enabling them to be contributing members of society

Aim

Half the K-12 public schools in the United States are Summit Personalized Learning environments by Fall 2025

Secondary Drivers

Summit Schools and Strategic Services supporting Summit schools are sustainable on public school dollars

Students leave Summit Schools with the Summit Personalized Learning Outcomes

Summit Schools have a culture of continual improvement

Enough schools are recruited to do Summit Personalized Learning

Pilot team creates a Summit Personalized Learning environment

Summit Personalized Learning pilot teams convert and sustain whole school Summit Personalized Learning environments

Districts and CMOs support the growth of SPL environments to other schools within their organization

Content, curriculum, and assessment supports K-12 Summit Personalized Learning environments

Summit PLP supports K-12 Summit Personalized Learning environments

There is a playbook of organizational structures and policies aligned to SPL

Adult learning content, curriculum, and assessment supports K-12 Summit Personalized Learning Environments

There is a diverse, high-quality talent pool of SPL teachers

People are convinced that SPL is what their school(s) should be

People believe Summit Personalized Learning is attainable for themselves

Being an SPL graduate is a competitive advantage for acceptance to Top 50 colleges

Being a SPL graduate is a competitive advantage for hiring by America's top 100 employers

SPS has the financial resources to reach its goals.

The K12 Team has the financial resources to reach its goals

The partnership has the human capital resources to reach its goals

Partnership structures support collaboration

The community demands public, K-12 schools do Summit Personalized Learning
(Community includes K-12 teachers & leaders, students, parents, politicians, colleges, employers, and more)

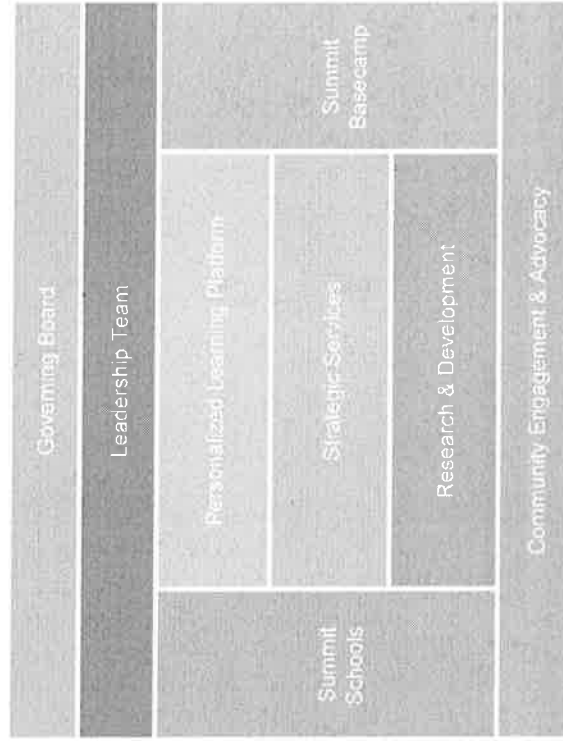
Tools and infrastructure that enable Summit Personalized Learning are available and easily access the

The SPS/Facebook partnership has the resources to reach its goals



Team Missions, Responsibilities, and Faculty

The Summit-Facebook Personalized Learning Partnership



LEADERSHIP | Team Mission & Responsibilities

Team Mission: Set vision, direction and culture of Summit Public Schools.

DIVERSITY & EQUITY	CULTURE	DEVELOPMENT
Engage the entire organization in realizing our commitment to diversity and equity <ul style="list-style-type: none">• Ensure that diversity and equity is always a priority• Drive systems and operational improvement based upon proven practices to increase diversity and improve equity• Enable conversation, discussion and action towards improved diversity and equity	Organize every aspect of Summit in alignment with our values, beliefs, behavioral norms and rituals <ul style="list-style-type: none">• Organization-wide events and communications• Team building and culture	Secure the funding resources needed to realize Summit's vision <ul style="list-style-type: none">• Identify prospective donors• Cultivate donors• Design and lead fundraising campaigns

LEADERSHIP | Faculty

TEAM LEADERSHIP	Diane Tavenner Chief Executive Officer <ul style="list-style-type: none">• Kristen McCaw Chief of Staff• Open/Shared Executive Assistant
Mira Browne Chief External Officer Adam Carter Chief Academic Officer Lizzie Choi Chief Program Officer Andrew Goldin Chief of Schools Isabelle Parker Chief Finance and Operations Officer Jason Solomon General Counsel	

SUMMIT SCHOOLS | *Team Mission & Responsibilities*

Team Mission: Operate a network of high-performing, personalized schools.

SCHOOL LEADERSHIP & FACULTY	PROGRAM	COMMUNITY
<p>Realize the vision of high-performing, personalized schools.</p> <ul style="list-style-type: none"> • School culture • Instruction and mentoring • Student, family, and community relationships 	<p>Partner with site teams to support students, engage and develop faculty, and build campus programming that promotes high-quality, personalized learning.</p> <ul style="list-style-type: none"> • Special Education • English Language Learners • College Readiness • Teacher Coaching • Professional Development • Academic Program • Tutor Program • Induction Program • Leadership Fellows Program 	<p>Partner with site teams to communicate clearly to key stakeholders, engage deeply with families and work effectively with community and governmental partners.</p> <ul style="list-style-type: none"> • Marketing & Communications • Media/PR • Family Engagement • Government Affairs • School Specific Development

SUMMIT SCHOOLS | Faculty

TEAM LEADERSHIP		SCHOOL/FACULTY & LEADERSHIP		
Andrew Goldin Chief of Schools • Megan Young Executive Assistant				
SCHOOL/FACULTY & LEADERSHIP		PROGRAM		COMMUNITY
Open Senior Director - Schools		Lisa Kleinhofer Senior Director - Program		Open Senior Director - Advocacy and Community
Penelope Pak McMillen Executive Director Kaitlin Eison Washington Assistant Director • Summit Prep Faculty Christopher Lewine Executive Director Drew Moriates Assistant Director • Everest Faculty Jesse Roe Executive Director Edwin Avarca Assistant Director • Rainier Faculty Nicholas Kim Executive Director Jonathan Stewart Assistant Director • Tahoma Faculty Caitlyn Herman Executive Director Wren Maletsky Assistant Director • Shasta Faculty	Abby Johnson Senior Director - Schools (WA) Kevin Bock Executive Director Antica Billisoly Assistant Director • Denall Faculty Kelly Garcia Executive Director Shilpa Duvoor Assistant Director • K2 Faculty Greg Ponikvar Executive Director Alex Horowitz Assistant Director • Olympus Faculty Malia Burns Executive Director Denice Randle Assistant Director • Sierra Faculty Abbie Ridenour Executive Director • Tamaipals Faculty Caitlin Reilly Executive Director Lucretia Witte Assistant Director • Expeditions Faculty Katie Bubalo Executive Director • Atlas Faculty	Kieran McMillen Director of Program • Lily Lam Manager - Induction Program • Sean Griffin Manager - Program • Alex Caron Manager - Program • Devin Ozdogu Manager - Program • Mike Rettberg Manager - Program • Open Manager - Special Projects Kristin Hannon Director - College Readiness Andy Lichtblau Director - Special Education • Laurel Horn Manager - Specialist • Geoff Osman Manager - Specialist • Erik Luebbers Manager - Specialist Open Director of Pipeline Programs • Ava Petrash Manager - Tutor Program • Alycia Tumlin Manager - Guest Teacher Program • Guest Teacher Faculty		Leslie Erne Manager - Government Affairs Rosa Baeza Manager - Development Catherine Madden Director - Communications & Media • Open Manager - Communications Betty Chen Director of Family Engagement • Open Manager - Family Engagement (South Bay) • Open Manager - Family Engagement (WA) Open Director - Community Engagement (WA)

STRATEGIC SERVICES | Team Mission & Responsibilities

Team Mission: Design and implement an innovative, values-aligned and sustainable services model for personalized learning schools.

FINANCE	REAL ESTATE & FACILITIES	TALENT	SCHOOL SITE & DATA OPERATIONS	TECHNOLOGY
<p>Ensure the organization is fiscally compliant and sustainable</p> <ul style="list-style-type: none"> Budgeting Financial Reporting AR/AP Audit Payroll Insurance Financial systems 	<p>Ensure high-quality personalized learning facilities for students and faculty</p> <ul style="list-style-type: none"> New facility identification/development District/owner relations/reporting Space use design Ongoing maintenance support 	<p>Ensure that Summit attracts, develops and retains a world-class faculty</p> <ul style="list-style-type: none"> Recruitment Selection Enrollment On-boarding (Blue) Engagement (Blue) HR compliance and legal issues Compensation Employee Issues 	<p>Ensure the organization is operationally compliant and student information is accessible and accurate</p> <ul style="list-style-type: none"> Front Office Operations Attendance Meals Program Transportation Field Trip and Athletics Compliance Registrar Base Camp Events 	<p>Ensure technology is aligned and effectively enables personalized learning</p> <ul style="list-style-type: none"> Technology infrastructure Web development E-rate Data Integration Salesforce platform Data privacy Cyber safety Digital Citizenship Ed tech partnerships and systems

STRATEGIC SERVICES | Faculty

TEAM LEADERSHIP		Isabelle Parker Chief Finance and Operations Officer • Kristen Barkis Special Projects • Open/Shared Executive Assistant		
FINANCE	REAL ESTATE & FACILITIES	TALENT	SCHOOL SITE & DATA OPERATIONS	TECHNOLOGY
Gavin Kwong Controller	Norman LoPatin Senior Director of Facilities	Laura (Firefrock) Henderson Senior Director of Talent	Josh Lotstein Director of Operations	Bryant Wong Chief Technology Officer
Matt Paolini Finance Director Cameron Johnson Finance Manager Po Ju Ko Accounting Manager Alice Dollner Accounting Manager Danny Wong Staff Accountant	Clint Sholl Director of Facilities Myron Kong Real Estate Project Manager	Melissa Avila Director of Human Resources • Kim Hamrick Human Resources Assistant • Open Manager Vivek Murali Director of Selection/Recruitment • Jennifer Pollock Manager of Selection • Open Manager of Recruitment	Mike Dunham Director of Data Operations • Sally Zou Manager of Data Operations • Patrick Yoho Manager of Data and Information Systems • Zoe Downing Associate of Data Operations • Connie Choi Associate of Data Operations • Bobby Cupp Manager of Special Projects and College Tracking • Aaron Gourdini Associate of Data Operations Ann Howland Manager of Meals Programs Miriam Renee Director of Regional Operations • Nayeli Hernandez Manager of Regional Operations Antoinette Sooh Director of Special Events	Joe Bielecki Director of Digital Safety Jack Chen Network Manager • Andrew Shuck Network Administrator • Alex Suthaboon Network Administrator Mei Mei Ngai Webmaster Annie Kuo Director of Technology • Margaret Chi Salesforce Administrator / Device Specialist • Philip Chui Regional Device Manager • Vincent Wang Device Specialist • Anthony Reed Lead Device Specialist • Doug Roske Regional Device Manager (WA) Open Business Systems Analyst

RESEARCH & DEVELOPMENT | Team Mission & Responsibilities

Team Mission: Empower educators with excellent resources, learning opportunities, and tools. Learn from and with personalized learning educators.

PLP PRODUCT DEVELOPMENT	CURRICULUM & ASSESSMENT	RESEARCH (DATA) & INFORMATION (ANALYSIS)	IMPROVEMENT	INCUBATION
<ul style="list-style-type: none"> Propel the vision of personalized learning in the PLP in partnership with educators and developers. Product Development R&D Features Adult Learning Tools and Features 	<p>Engage educators to ensure our curricula and assessments are accessible and move from good to great.</p> <ul style="list-style-type: none"> Base Curriculum Spanish Community Math Science History ELA 	<p>Get the right information to the right people at the right times, and in the most actionable and accurate ways. Monitor progress.</p> <ul style="list-style-type: none"> Statistical analysis Data infrastructure Measurement framework Quality evaluation Dashboards, reports, & tools Partner training Provide data analysis for research 	<p>Partner with practitioners and researchers to inspire continuous improvement.</p> <ul style="list-style-type: none"> Define research agenda Improvement science Learning science Qualitative research Knowledge management about learning Manage SRI relationship English Learner improvement SAIC partnership 	<p>Incubate programs that have the potential to make dramatic improvements for students and educators.</p> <ul style="list-style-type: none"> Credentialing Summer Programs K-5 Post secondary

RESEARCH & DEVELOPMENT | Faculty

TEAM LEADERSHIP				
Adam Carter Chief Academic Officer • Maris Yanow Senior Director of Strategy • Open Executive Assistant				
PLP PRODUCT DEVELOPMENT	CURRICULUM & ASSESSMENT	RESEARCH (DATA) & INFORMATION (ANALYSIS)	IMPROVEMENT	INCUBATION
Marie White Senior Director of Product Development Maria Anaya Director of Adult Learning Product Development • Maya Simpson Manager of Adult Learning Content Development Open (<i>not to be filled until content needs fully defined</i>) Manager of Content Development	Open Senior Director of Curriculum & Assessment Tatiana Georgieva Manager of Base Curriculum Teresa Himmelsbach Teacher on Special Assignment, Spanish Sophia Kokores Teacher on Special Assignment, Community Zack Miller Teacher on Special Assignment, Math Monica Sircar Teacher on Special Assignment, Science Megan Toyama Teacher on Special Assignment, History Open TOSA, ELA	Vishal Shah Chief Information Officer ⇄ Harry Li Engineer (FB) Open Director of Data Science Howard Shen Director of Data Analysis • Ankeet Shah Manager of Data Analysis • Sinhuja Nagalingam Manager of Data Analysis • Open Manager of Data Analysis Mary Halverson Associate of Information Analytics	Ross Lipstein Director of Research Projects • Ron Delaney Manager of User Experience Research • Kyle Moyer Manager of Continuous Improvement • Meilante Clay-Solomon Manager of Summer Programs	Pam Lamcke Director of Credentialing • Molly Posner Manager of Credentialing Programs

SUMMIT BASECAMP | Team Mission & Responsibilities

Team Mission: Enable teachers, schools, and community-based and national partners to foster personalized learning environments.

EXECUTIVE CONSULTING	OUTREACH	ONBOARDING & ENGAGEMENT	P/D DESIGN
<i>In progress</i>	<p>Inspire others about personalized learning and compel schools to join our Basecamp community</p> <ul style="list-style-type: none"> • Basecamp Media • Basecamp Marketing and Communications • Basecamp recruitment Experiences (tours, webinars, conferences) • Create and manage the recruitment funnel • Customer Support 	<p>Onboard and engage Basecamp schools as they adopt personalized learning school wide</p> <ul style="list-style-type: none"> • In person and virtual professional development for basecamp schools • Codify lessons across network to inform PLP product, R&D and Summit schools • Design scalable model for future cohorts 	<p><i>In progress</i></p> <ul style="list-style-type: none"> • Summer Training, regional convenings, group coaching calls, asynchronous resources • Certification program, Summer Training, regional convenings, group coaching calls, asynchronous resources • Leads certification program to ensure enough facilitators for following years

SUMMIT BASECAMP | Faculty

TEAM LEADERSHIP				
Lizzie Choi Chief Program Officer • Open Executive Assistant ⇌ Adam Seldow Head of Partnerships (FB)				
EXECUTIVE CONSULTING	OUTREACH	ONBOARDING & ENGAGEMENT		PD DESIGN
Tyler Sussman [Senior] Director of Executive Consulting	Ashley Prince [Senior] Director of Outreach	Amy Sandoz Senior Director of Onboarding and Engagement	Open Senior Director of Onboarding and Engagement	Jess Agus Senior Director of PD Design
Open Manager of Executive Consulting	Patty Suquilanda Manager of Recruitment Christina Foust Manager of Recruitment Open Manager of Recruitment Open Director of Sales ⇌ Adam Seldow Head of Partnerships (FB) • Open Manager of Partnerships (FB)	Open Basecamp Program Managers (10)	Open Basecamp Program Managers (10)	Open Teacher facing PD design/content Open School leader PD design/content Open Director of Certification/District PD design/certification training Open Project Manager (D) (Summer Training; Regional Convenings) Open Director of Summit Learning Certification

COMMUNITY ENGAGEMENT & ADVOCACY | Team Mission & Responsibilities

Team Mission: To inspire public understanding and awareness of personalized learning and to empower individuals with the information, tools and resources to take action within their own communities and networks.

MEDIA	MARKETING & COMMUNICATIONS	EXPERIENCES
In progress	<p>Communicate a compelling, positive vision for what is possible in education. Create and leverage public awareness campaigns to share this vision broadly across multiple channels.</p> <p>Advocate for, promote and celebrate, the diverse expressions of personalized learning environments across the nation.</p>	In progress

- Marketing & Promotional Activities
- Communications
- Social Media
- Events & Conferences

COMMUNITY ENGAGEMENT & ADVOCACY | Faculty

TEAM LEADERSHIP	<p>Mira Browne Chief External Officer</p> <ul style="list-style-type: none"> • Open/Shared Executive Assistant <p>⇔ Andrew Howard (FB)</p>
MEDIA	EXPERIENCES
TBD Director of Media Relations	<p>MARKETING & COMMUNICATIONS</p> <p>Manisha Shah Senior Director of Recruitment and Enrollment ⇔ Tim Jordan Director of Marketing (FB)</p>
	<p>Open Director of Marketing and Communications</p> <ul style="list-style-type: none"> • Donna Park Manager of Marketing and Communications <ul style="list-style-type: none"> ◦ Partner content, Events • Emily MacNeil Manager of Marketing and Communications <ul style="list-style-type: none"> ◦ Digital • Open Manager of Marketing and Comms <p>Kasey Van Ostrand Manager of External Affairs Open Manager</p>

