



# Turning Points in American History: Knowledge, Understanding, and Perspectives

Advisory Board Meeting

April 8, 2011



# Advisory Meeting Agenda

- INTRODUCTIONS – 5 minutes
- APPROVE JANUARY MINUTES - 5 minutes
- PROJECT ACHIEVEMENTS - Elise -20 min.
- EDU2.0 – A LOOK AT TEACHER WORK & REVIEW GRANT APPLICATIONS - Scott - 30 minutes
- NEW PERFORMANCE MEASURES– Cindy Char- 20 minutes
- BREAK -10 minutes
- DISCUSSION: WAYS TO IMPROVE (in light of new performance measures) – Elise – 20 minutes
- 2011-2012 CALENDAR/BROCHURE – Scott -20 minutes
- DISCUSSION: HOW TO HAVE A PROFITABLE RETREAT - Elise – 20 min.
- FINANCES /INVOICES, MOU’S & W9 FORMS – Scott –20 minutes

# Project Achievements



- SEMINARS: Civil War in January & WWII in April
  - PRIMARY SOURCE STUDY GROUPS
    - BOOK GROUPS
  - NATIONAL FIELD STUDY
  - LOCAL FIELD STUDIES
  - GRADUATE STUDENTS
  - 3 TEACHER LEADERS
    - PRODUCTS:  
Lessons / curriculum  
Deck of Cards  
Bibliographies

# EDU 2.0 – A look at Teacher Work and Review Mini-Grant Applications



# TAH meeting in D.C. to rewrite our performance measures.

## Old objectives from the grant:

- 1) **Increase teacher content knowledge** and understanding of the National Assessment of Educational Progress (NAEP) eras and themes, with an emphasis on democratic principles of freedom, justice, and equality as articulated in national and Vermont founding documents
- 2a) **Enhance teacher skills** for teaching history content, historical thinking processes and historical writing skills
- 2b) To **build teacher capacity** to deliver improved and engaging classroom instruction in traditional American history
- 3) **Promote a collaborative culture** by building a cadre of teacher leaders and strengthening peer-to-peer professional development and museum partnerships

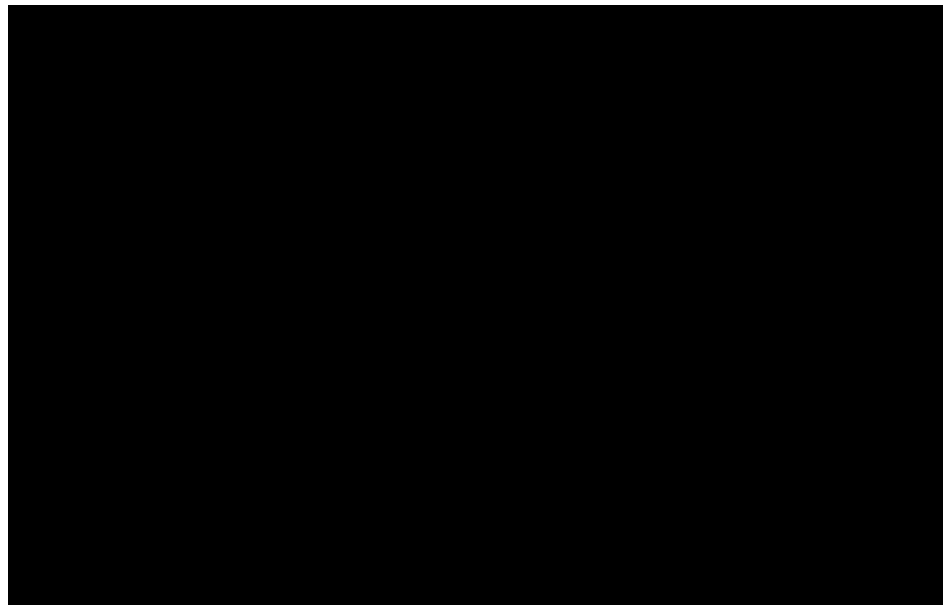


# New Performance Measures

**CHAR ASSOCIATES**  
AN EDUCATIONAL DESIGN AND EVALUATION FIRM

Cynthia Char

10 Minute Break...



# Discussion: Ways to Improve in light of new performance measures



**What are the best models for professional development for learning history content and concepts?**

**What are the best models for professional development for historical thinking skills & pedagogy?**

**What are the best models for fostering a learning community?**

**How do we measure up?**



# 2011-2012 Calendar & Brochure

Date	Event
• July 19-20, 2011	Advisory Board Meeting and Retreat
• September 30, 2011	Educator-led Seminar: EdTechTeacher
• October 13, 2011	Book Study Group #1
• October 28, 2011	Scholar-led Seminar: Dr. Mary Beth Norton – How Revolutionary was the Revolution?
• November 17, 2011	Book Study Group #2
• December 15, 2011	Book Study Group #3
• January 10, 2012	Primary Source Study Group #1 (North)
• January 12, 2012	Primary Source Study Group #1 (South)
• January 26, 2012	Book Study Group #4
• February 10, 2012	Scholar-led Seminar: Dr. Eric Foner – Reconstruction as a Turning Point
• February 14, 2012	Primary Source Study Group #2 (North)
• February 16, 2012	Primary Source Study Group #2 (South)

# 2011-2012 Calendar & Brochure

- March 13, 2012 Primary Source Study Group #3 (North)
- March 15, 2012 Primary Source Study Group #3 (South)
- March 29-30, 2012 Educator-led Seminar: Words Come Alive! w/ the Flynn Center
  
- April 10, 2012 Primary Source Study Group #4 (North)
- April 12, 2012 Primary Source Study Group #4 (South)
- May 8, 2012 Primary Source Study Group #5 (North)
- May 10, 2012 Primary Source Study Group #5 (South)
- May 16, 2012 Scholar-led Seminar: Dr. Elizabeth Lewis-Clark – For a Real Better Life: Gender, Race & Migration in the 20th Century
  
- June 25-27, 2012 Local Field Study: Revolutionary Era thru the Early Republic
  
- July 8-14, 2012 National Field Study – The Civil War Era
- July 19-20, 2012 Advisory Board Meeting and Retreat
- July 23-25, 2012 Local Field Study: The Civil War
- August 6-8, 2012 Local Field Study: 19th Century America

# Discussion: How to Have a Profitable Retreat?

**Purpose**: Motivate people to help us improve – let them dream big. Give them autonomy. Challenge them to create something new or replicate something we've done. Provide support.

Things to be sure **to do**: Reward people. Challenge them. What else?

Things **NOT to do**?



# Turning Points

## Quarterly Financial Report

Category	Expenses to Date	Approved Budget for Year 1	Current Projected Expenses for Year 1	Surplus or Deficiency in Funding
Personnel	71,114	135,431	126,056	9,375
Travel	379	2,700	2,480	220
Supplies	28,985	45,300	32,114	13,186
Contractual	46,468	100,000	107,300	* -7,300
Other	3,916	15,900	13,278	2,622
Training Stipends	** 0	44,000	44,000	0
<b>TOTAL</b>	<b>150,862</b>	<b>343,331</b>	<b>325,228</b>	<b>18,103</b>

\* Increased National Field Study from 12 to 26 participants (additional \$13,000)

\*\* No teachers have taken yet the opportunity for mini grants or stipends

# Invoices, MOUs, and W-9s

## INVOICE

DATE: October 19, 2010  
 DATES OF SERVICE: September 21-October 18, 2010  
 FOR: Turning Points in American History  
 BILL TO: Turning Points in American History  
 South Burlington School District  
 123 Ethan Allen Avenue, Suite 301  
 Fort Ethan Allen, 246005 Hall  
 Colchester, Vermont 05446  
 Phone: 802 489 5604  
 Fax: 802 489 5604

DESCRIPTION OF SERVICE	AMOUNT
Met with Primary Source Study Group staff	
Created Turning Points office wireless network	
Distributed program brochure through MailChimp	
Met with local museums for scholar-led seminars	
Created pretest with project evaluator	
Worked with webmaster to revise and build website	
Searched for library consultant	
Purchased supplies, copier and electronic equipment	
Registered teachers for events	
Collected contracts, W9s, and invoices from contractors	
Organized first Advisory Committee meeting	
Created registration process using Survey Monkey	
Began the process of establishing Turning Points online classroom	
TOTAL	\$

Print Name \_\_\_\_\_ Signature \_\_\_\_\_ Title \_\_\_\_\_ Date \_\_\_\_\_

**W-9**  
Form  
(Rev. October 2007)  
Department of the Treasury  
Internal Revenue Service

**Request for Taxpayer  
Identification Number and Certification**

Give form to the  
requester. Do not  
send to the IRS.

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Name (as shown on your income tax return) \_\_\_\_\_

Business name, if different from above \_\_\_\_\_

Check appropriate box:  Individual/Sole proprietor  Corporation  Partnership  Limited liability company. Enter the tax classification (D=disregarded entity, C=corporation, P=partnership)  Other (see instructions)  Exempt payee

Address (number, street, and apt. or suite no.) \_\_\_\_\_

City, state, and ZIP code \_\_\_\_\_

Last account number(s) here (optional) \_\_\_\_\_

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**Part I Taxpayer Identification Number (TIN)**

Enter your TIN in the appropriate box. The TIN provided must match the name given on Line 1 to avoid backup withholding. For individuals, this is your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the Part I instructions on page 3. For other entities, it is your employer identification number (EIN). If you do not have a number, see How to get a TIN on page 3.

**Part II Certification**

Under penalties of perjury, I certify that:

- The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me), and
- I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding, and
- I am a U.S. citizen or other U.S. person (defined below).

**Definition of a U.S. person.** For federal tax purposes, you are considered a U.S. person if you are:

- An individual who is a U.S. citizen or U.S. resident alien,
- A partnership, corporation, company, or association created or organized in the United States or under the laws of the United States,
- An estate (other than a foreign estate), or
- A domestic trust (as defined in Regulations section 301.7701-7).

**Special rules for partnerships.** Partnerships that conduct a trade or business in the United States are generally required to pay a withholding tax on any foreign partner's share of income from such business. Further, in certain cases where a Form W-9 has not been received, a partnership is required to presume that a partner is a foreign person, and pay the withholding tax. Therefore, if you are a U.S. person that is a partner in a partnership conducting a trade or business in the United States, provide Form W-9 to the partnership to establish your U.S. status and avoid withholding on your share of partnership income.

The person who gives Form W-9 to the partnership for purposes of establishing its U.S. status and avoiding withholding on its allocable share of net income from the partnership conducting a trade or business in the United States is in the following cases:

- The U.S. owner of a disregarded entity and not the entity.

**General Instructions**

Section references are to the Internal Revenue Code unless otherwise noted.

**Purpose of Form**

A person who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) to report, for example, income paid to you, real estate transactions, mortgage interest you paid, acquisition or abandonment of secured property, cancellation of debt, or contributions you made to an IRA.

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN to the person requesting it (the requester) and, when applicable, to:

1. Certify that the TIN you are giving is correct (or you are waiting for a number to be issued),
2. Certify that you are not subject to backup withholding, or
3. Claim exemption from backup withholding if you are a U.S. exempt payee. If applicable, you are also certifying that as a U.S. person, your allocable share of any partnership income from a U.S. trade or business is not subject to the withholding tax on foreign partners' share of effectively connected income.

**Note.** If a requester gives you a form other than Form W-9 to request your TIN, you must use the requester's form if it is substantially similar to this Form W-9.

Cat. No. 10221X Form **W-9** (Rev. 10-2007)



See you in July!

Our next Advisory Board meeting will be July 19th  
at the Grand Isle Lake House!

July 20<sup>th</sup> is our retreat.