

Lowell Collegiate Charter School

Questions as derived from panel review

NOTE: Interview text in italics indicates a response provided by a member of the proposed management organization.

Mission, Vision, and Description of the Community (ies) to be Served

1. How have your experiences living and working in Lowell led you to want to start a charter school in Lowell? What do you think are some of the challenges you may face? What skills and knowledge does the founding group possess to address these challenges?

- I have a school in Lowell and I have parents yearly that panic in spring – what can I do with my child? More lately in the last five years and seems to be happening quite frequently. So because of that I give my expertise on the child whether public or parochial. The cost factor is huge for some of the families. They are struggling but they want a good education for their child. They like core values. They like what I do teach which is responsibility and accountability for children in my preschool. They see that and they want it to continue. I feel that SABIS, because I visited and have learned a lot about it, would address the needs of the children and what parents want.
- I am a retired elementary school principal. Obviously, I believe in education and I believe in Lowell. I am a lifelong resident of Lowell and Lowell has come a long way. I believe there are families that do well in the public education settings and that do well in the parochial settings but are also looking for another alternative and those are charter schools. There are only two charter schools in Lowell. I think there is room for an additional charter school in Lowell. I did visit the SABIS school and liked what they have to offer. Education is a very valuable commodity to families that may not have had the opportunity to expand their own education but they want the opportunities for their children. This particular type of school would allow some families to be able to get the alternative that a public school would not provide for them in their comfort zone and they may not have the opportunities to afford a parochial school.
- I was born and brought up in Houston, Texas. I have been in Lowell for ten years. I was in Worcester at the medical school for about ten years. I came to Lowell to be the guidance director at Lowell High School. I find the diversity intriguing and attractive here in Lowell. It would be difficult to find a small city that is as diverse culturally, ethnically, and linguistically as Lowell is. The possibility of parents to have a choice... The challenges that public schools face are huge, the time to explore other ways, other models, to instruct students is hard to do at a public school. We are continually asked to do more with less. A charter school provides the community with an opportunity to get a better handle on instructional opportunities for families.

2. What are the challenges that Lowell students face that your proposed school will address? What are the needs of children of immigrant families living in Lowell?

- I can tell you from my perspective – the continual assessment – the opportunity for instruction to be tailored specifically to students. Educators are expected to use data to inform instruction which is difficult if you only get it at the end of the year but if you are examining how students are doing in terms of getting mastery of a concept routinely, weekly and you are conferring about it, you are making adaptations to your instructional model – that is huge. It is not that Lowell schools don't attempt to do that but in this particular model it is an integral part of the instructional approach.
- A lot of the parents of students in Lowell were not necessarily educated in Massachusetts or the US and some of them are not able to help their children with homework. SABIS provides a peer tutoring program that provides students with another set of eyes, someone else to help students by looking at their homework. There are Intensives- one-on-one teacher student tutoring – if the student is behind based on the regular assessments. There is also programming on values at this school as well that may be lacking in certain families that we see. There is a unique approach in some of those things as well.

3. Describe how your proposed school would become a community resource for all stakeholders.

- To kind of back Maura in what she was saying – what impresses me about the application is the fact that there is an organized recognition of the students. One of our objectives is to have the feeling that kids and parents belong, that they are welcome, that they are integral to the school. I think that it is part of our application that is significant.
- We have begun partnerships with local organizations, like the Boys and Girls club of Lowell, part of the program is to encourage community service which will put students out in the community to help. There is also networking advantages from the school out and from the outside in. It will flower as a result of that requirement and that priority.
- I am also on the board of the Boys and Girls Club. The board at the Boys and Girls club is very excited about the opportunity to have this type of charter school in Lowell. Education is an integral part of the Boys and Girls Club. To have this type of school to bring in peer tutoring and homework help afterschool, it could be a benefit for the students at the Boys and Girls Club who may not attend the school, but they can learn from the school.
- We have also reached out to community leaders – we have a lot of interest. We have two Representatives, two former mayors. We have spoken to them personally and they are very excited.

4. What outreach have you made to families in Lowell?

- The families are very interested because they know the parental involvement that will happen at SABIS.
- Lowell has a big Indian community and being Indian, education is the most important thing. My experience in Lowell, when my children were growing up we have a hard time where to send in the schools. We did not think the standards were where we thought they should be for them. I taught my daughter because of finances we couldn't send her to private schools so they went to Lowell Public Schools. We don't have any choice. They did beautifully because I paid attention to them and helped educate them. Most of the Lowell is working class people and they may not be highly educated but they still want their children to have a good education. They always asked me about the different schools, they are scared of sending their children to the public school whether that is right or wrong. They want some kind of option but not enough money to send their children to the private schools. So they are in limbo. I meet with families regularly to talk.
- We have had some media attention to the school. We are sending our message out to families. We have all acted as ambassadors. We have performed outreach in our professional networks by having personal conversations with parents. We are careful not to make any promises because we can't make any promises yet. We do a lot of listening. We can't communicate yet something that we don't have and we've been cautious as a result but we remain hopeful. I would say that we do have a lot of geography covered and we do a lot of listening.
- I want speak out about Lowell's uniqueness as a community. The people are very passionate about the city and making this city a better place for everyone. That is another reason that I am on the board. I am also on the board because I was born and raised in Lowell. I went through the public schools and University of Massachusetts. To have a school that talks about college from day one - it is a very important thing for kids whose parents may not have gone to college. I am a first generation college graduate in my family. From day one college is your end goal because education is very important. The parents get brought in as part of that end goal that my kid is going to go to college. The curriculum that is set up with this charter school is so beneficial to that. The city embraces this idea very passionately. I am a business owner. The interaction I have with people on a daily basis – people ask me daily about the proposed school and why I am on the board. They ask me what it will bring to the city. That interaction shows me that people are excited about the proposed school. Other small businesses that have sent letters of commitment stating that they are excited about it. My peer group has kids going through school right now and they are excited about it.
- We did have a meeting at the Lowell Memorial Auditorium and we had parents come and listen to SABIS after the final application was submitted. We had about a dozen people attend.

5. Why did the proposed board choose SABIS? Tell us about any other EMO/CMO that you considered.

- First of all, a little bit of background: Kate and I, we were very brief members of the Lowell Community Charter School (both less than a year) and one of the issues that arose at the school was the fact that the Commissioner was concerned about academics and assorted other things. We were told to basically look at the possibility of a management selection. We had SABIS come in for a discussion with that board. Some of us were in favor of it some of us were not. I believe there were three companies that we looked at: SABIS, KIPP, and Renaissance. When SABIS was rejected, Jose indicated to us that they were going to try to do something. As a result of that, Kate and I followed up with contact with SABIS and even met with the chair of the Springfield SABIS School and visited the school. We then looked at who we would have on the board that would be varied and diverse and brought all of them out to the Springfield school. We interacted with the administration, staff, and students. We had a fairly broad look at that. SABIS presents a rigorous academic program. Because of this rigorous program that we were seeing at Springfield and in our conversations with the SABIS organization, we thought this was a good group to look at because it fit in with our feelings or emotions about having a rigorous program. That's basically why we went with them, we had exposure to other organizations but SABIS had the program and the rigor that we wanted.

Educational Philosophy, Curriculum and Instruction

1. How does the founding group define academic rigor?

- I was probably the skeptic. I knew SABIS; I have a niece that graduated from a SABIS school in Somerville a few years ago. My preference was that we run the school – that a community based board run the school. I had to be convinced. I am familiar with the charter school in Lawrence. I am familiar with the charter schools in Texas - some have been successful and some not. My segway into rigor is that it is rigor that is very well supported. It is not rigor for the sake of rigor. We are not pulling a curriculum off the shelf that says this is what we want students to know in order to be successful in college. That sort of stuff has been around for years. This particular rigor is supported by the continual assessment, the instructional support for teachers. The teachers are collaborating with peers and leaders in the school structure that are going to make it possible for students to get that conceptual knowledge down. It will help the students move to the next level. It is on not rigor absent support.
- The extra math and English a day that alone is an extra period that they have – the 7 periods, the 30 hours of real instruction that happens every week. That is not lunch but it is real instruction.

2. George Saad (Vice President of U.S. School Operations) and Jose Afonso (Director of U.S. Business Development), how does SABIS define rigor?

- *It is about high expectations for all students. It begins with the SABIS curriculum. We created the curriculum by looking at what top colleges and universities are seeking in terms of skills and knowledge for their first year freshmen and work our way back down all the way to kindergarten. In crafting our curriculum, we ensure it is sequential, about building blocks, and mastery. The rigor part is about demonstrating mastery at every step of the process. Through this weekly academic assessment which we provide – it is an external assessment not teacher created - it is a true accountable external measurement of knowledge and retention of knowledge from previous lessons that allows us to measure mastery along the way, to ensure that students aren't developing learning gaps that would prevent them from learning future concepts. By creating a program that is about building blocks, and ensuring that the foundation is there at every step of the process is one of the ways that we define rigor.*
- *I'd like to add one aspect. We've spoken about student assessment but there is one aspect that is not given enough attention when we talk about rigor. The valued added that comes from student assessment, other than the data and making sure that students are learning, think about today's children and what they are exposed to every day. They seldom have the opportunity to sit down and focus for an extended period of time. That is a skill that we are losing often in many schools. Our assessment system gives these skills, starting in first grade, at least two full opportunities every week of an hour each to sit down and focus under the pressure of time and accountability and produce what they have learned up to that point. Starting in 3rd grade, we double that to four times a week. We are flexing the students' mental muscles to handle the pressures of learning under the pressures of time and at the end of it they know they are being held accountable to their performance. This aspect of testing to us is a very present yet hidden value added of our assessment system.*
- *We have found that kids are intimidated by that when it is a mystery to them but our program removes the mystery form that and I'll tell you how. When students join a member school, we do a very thorough diagnostic screening of the student. The purpose is to determine, as best as we can, where they are academically. What academic gaps do they have? What is their starting point of learning? What prerequisite knowledge do they acquire so that we can start building on that knowledge? That process is very transparent to these students. They are our partners in this process. We want to tell them what they know and more importantly what they don't know. They need to know what they are missing. They need to know where they are relative to where they should be. It is showing the students – look, this is where you are today and this is where you should be but the good news is we have a plan to get you from here to there. And this is the plan, it is quantifiable and manageable – you know exactly what it is – there is no mystery to it.*

3. What are the academic supports in place with this program for students?

- *We look at what we have, if we can, before they even show up on day one. We do an extensive diagnostic testing as part of the registration process to get the ball rolling beforehand. We analyze the data and we consider how we can group the kids according to their common prerequisite knowledge. We have had the situation in start up schools where, looking at the numbers, you have a grade that may have two sections there are two, three or even four different levels according to their prerequisite knowledge. The kids are able to start at different points. We start with them according to their common starting point with an end objective in mind. No matter where you start, this is where we want you to be at the end of each term. There are interventions along the way and this is where our weekly assessment system kicks in.*
- The program is also about building leadership and confidence in each of these kids – that they can make their own decisions, that they can experience positive reinforcement. These people in my mind – they were grouping them and building the kids' confidence in each group. You're going to build leaders. If you are going to get them to talk, to speak, do different things through these groups - we are getting them to beat the learning gap. If you can get a student to have the confidence that they know that they can move on, it is so much easier. When I was in school, I had absolutely no confidence. I raised all kinds of Cain in school. In high school, I started paying attention but nobody even knew I was there. If you can build confidence, learning, and leadership ability – these are all educators and I am an accountant but my wife is a teacher and I hear about it every day. It is confidence and leadership and these people know how to do it.

4. What do you think are the critical elements that aid in the success of a SABIS school?

- I believe that the assessment tool points out the need for a plan for students. The support in place in the model that we are looking at for a student who does not do well on an assessment or finds themselves at an earlier starting point – the levels of support and intervention are determined by what comes out of the assessment. There are at least three formal programs in the SABIS model that I believe provide that support. One is the peer or precept tutoring; one is direct teacher instruction, as I understand the model and hope to hold them accountable for, there would be extra direct instruction for those that may need additional help during what would otherwise be free time. Then there is also the Saturday program for students who may be even further behind. One of the things that I like about the model and would certainly hold them accountable for, there can be no ridicule – there is a lot in the SABIS model about caring that a student does well and the culture of the school. The emphasis on the spiral learning process in the academic education but there is also some spiral in the relationship building as well which makes it easier for a student to buy into the plan for improvement and change more so than if they feel somehow weird or unusual about their level of performance.
- *One of the critical pieces about the differentiating factors about the SABIS curriculum is that it breaks down knowledge into essential and non-essential concepts. Without understanding essential concepts, it would be next to impossible to learn later knowledge. By creating intensive classes, which are small group instruction, we are able to pull students out if they are falling so far behind or if they come into school so far below*

grade level for intensive instruction on the essential concepts so we can re-stream them to their regular classroom as quickly as possible. This practice can be found at all grade levels.

- What I like about the model and what I asked SABIS teachers from both Springfield and Holyoke about is the support for teachers. There will be that child... where it is unclear why they are unable to perform academically. At the same time instructional support is being provided by the teacher, there is also the reaching out to students between peers. That kind of emotional support - we are in this together. That works in medical school; it works in preschool. If I can feel like I am not alone in this – I have a partner – someone else is going to help me get through this. It gives me confidence. The not knowing is not a negative judgment – there is no punishment perception.

5. Tell us about the professional development opportunities for staff at the proposed school.

- I asked teachers what kind of support do you get when you don't know what is going on – it is as easy as asking their leader or the person on the campus. It can come from the Minnesota corporate office. Someone can come out to help a teacher, to help an administrator to figure out how best to approach the academic needs. They will get the support that is needed to address the needs of the individual child. I am holding SABIS accountable because this is what we've been told and what we have seen in both Holyoke and Springfield. On a personal note, I have a niece who graduated from what started out as a SABIS model. When she started, she did not meet the criteria on the initial diagnostic. Within two weeks into school year, her teacher said she did have the knowledge and the adjustment was made immediately. She did not have to wait until the end of the semester or the end of the school year.
- *There are two types of professional development, typically one day per term embedded in the school calendar (three times per year) and then embedded professional development. The bulk of PD is on the job training. We have a dedicated academic principal, AQC. We may have several at the school depending on the grade span. That person's role is to exclusively focus on academics – student learning and staff delivery of instruction. The AQC has weekly grade level and subject level meetings to discuss the data that they are receiving weekly - comparing student performance and teacher performance. Assessments are used to evaluate both students and staff. How is the staff able to provide effective teaching – that is what the teachers are held accountable for. They are discussing at least once or twice a week the results with the teachers. They have at their disposal program coordinators from SABIS who are subject experts. They are present either in person or via video conferencing every time the meetings take place to discuss curriculum needs. Sometimes we have to teach the teachers. We work with the teachers beforehand knowing that we are coming to certain tough curriculum content. We know from experience areas that may need preemptive support from the SABIS content-area experts.*

6. How does the Student Life Organization (SLO) “empower” students?

- If the child is having problem, I’m not sure how the teachers would recognize it but they would assign another student to talk to them. If that other student can support their peer, they will have the confidence to go back in the classroom and get the questions done. The best thing for me is the leadership and how they will not get left behind, if somebody has a question if the teacher isn’t successful maybe another student can.
- One of the responsibilities of the chair of the board is to continuously communicate with the school director. As far as the students are concerned, there is a code of conduct that communicates five values – that the students will respect themselves, others, their family, their community, and the world– this starts at K. Now if a student has developed this respect for himself, for others, and his school since K – if this has been developed, he won’t be afraid of testing. SLO, the person who is in charge of that (SLO Coordinator) is in the school and actively involved with the students. If the peer work is not successful, the teachers will refer the student to the SLO which has resources. If that resource isn’t working, refer to the director and if that doesn’t work can refer to Minnesota as a source of help. An entire chain of command to call these things up.
- When Bill and I met with the chairperson at Springfield, he spoke about the great relationship with the director and that he would drop in on the school on his way home. Not interfering, because we know our role but there was a good relationship that they had. That is very important for a board.
- Student life piece is a core component of the SABIS program in all of our schools. The purpose is to fulfill our character education philosophy - to prepare student to become responsible citizens but also the leadership skills they need to succeed in life. Student Life is so important for us where we dedicated a full period each day to allow student to participate in a variety of student activities. It can have academic, extracurricular and discipline purposes. It is also about a role for every student. If you want to start a club, you can. You give opportunities for students to play an active role in the life of their school. They are not just receiving what the adults are giving them –they are there to give to each other. It creates buy-in, care, community, and participation in the life of the school. If you visit SABIS International, because of SLO it feels quite small – it is small tight community though it is over 1600 students.

7. Given that the statute explains that “charter schools shall not charge a public school for the use or replication of a part of their curriculum subject to the prescriptions of a contract between the charter schools and any third party providers” what aspects of the educational program are proprietary?

- The information that is disseminated a daily basis to all of the students and teachers; all of the materials are printed. SABIS has indicated to this board that while their program is quite structured, they are happy to share that information with other schools in the area and discuss it in depth with parents. While I would say that some of the books are copyrighted, students can take their materials home and would never be asked to not share their portfolio of information with anyone. It is not closely held.

- *SABIS like any other organization that spends considerable resources in research, and developing curriculum and assessments – textbooks, teaching materials, etc. - we are investing a great deal on constantly improving our program and incorporating new standards, the Core Common standards. We have 120 staff members focused on academics. We are investing the same as any other curriculum developer. We copyright what we do. The curriculum is now public, in many respects, and included in the final application but getting a copy of the curriculum is meaningless to anyone. We certainly provide it; the problem then comes in the implementation of it. We have a whole system for implementing a curriculum called the Point System of instruction. They can certainly create it themselves. SABIS also creates pacing charts which are provided to the teachers. These weekly pacing charts identify all the concepts that need to be taught each week. It is not possible to implement unless they use the whole thing.*
- *To put it simply, it is a service that we offer – it is open to anyone for a fee. If you use a textbook, you have to buy the textbook. Any public school is welcome to buy our textbooks. It is not more proprietary than that. We hold dissemination sessions to talk about our best practices open to any school – about how and why we do the things that we do.*
- In some ways – comparable to when you open a Houghton-Mifflin literacy series and you see the flow chart in the teacher’s textbook right there.
- One of the things that the board would like to be involved in is communication with and assistance to the public schools and parochial schools. We would like to be able to participate with them to share what we find successful.

Assessment, Promotion, and Graduation Standards

1. Describe the elements of the SABIS assessment system that results in a ‘well-rounded assessment platform.’

- One of the things that I like is that it covers everything and it is developmentally appropriate. It is not haphazard – it is targeted. It covers what a child is supposed to know conceptually across the curriculum

2. Who grades assessments?

- The AQC puts the student data in on Fridays from the weekly assessments (computerized through SABIS) and the results are there for teachers on Monday morning.
- AQC straightens it out for the teacher if there was a problem. The teachers are trained but the AQC can explain all of the tests. Diagnostic and weekly assessments are standard systems that are computer based tests and the formative assessments are teacher based.

3. How will SABIS assessments be modified to accommodate the needs of students with disabilities and students with limited English proficiency?

- They have a system at the schools all around the world, including the school in Holyoke and Springfield, similar student populations to Lowell, where it is modified according to the students' needs.
- *We would have at the school, just like an AQC, we have a special education coordinator who oversees the special education program as well as an ELL coordinator. They are responsible for any modifications or accommodations that need to be made on a student by student basis for the assessments. We have two types of assessments – machine scored and more traditional production type assessments that are corrected by staff. Both types of testing are modified by the special education or ELL coordinators as necessary.*
- What I noticed with staff from Springfield and Holyoke is that there is an attempt to make a determination to assess whether students understand conceptually in their native language but English is the issue. The intent, because of the production piece, is to provide an opportunity to demonstrate their content area knowledge. The emphasis can then be on getting the English that you need.

4. How are social benchmarks assessed and monitored for individual students?

- I spoke with teachers in Springfield. I was impressed in the cafeteria and in the social areas of the school. How it seemed to be even among the little kids there were standards of how they should behave in the different settings. I saw evidence that they were adhering to standards of behavior but I do not know the details of how that is implemented.

5. How about during the Student Life Period?

- Student Life Coordinator assesses their role in the Student Life. We heard from students in Springfield and this is indirect evidence of how this process works. Students talked about their experiences such as I became able to do something because of the support I was given in the Student Life period; I was given an opportunity to play a role that met my needs. I heard evidence that this is something that is attended to in a developmental way. You are given the opportunity to share with your peers, to reach out to your community. You define it. One student who particularly impressed me made it her priority to meet her own needs though she hadn't a clue where to start. Students get support in Student Life to develop and implement a plan to gain the skills with the help of their peers and the facilitator. The application of those skills that are not about cognitive stuff that we want kids to know – the students spoke to that with a lot of enthusiasm.
- *We measure these things – we have criteria under Student Life. Student's involvement in Student Life – we call them merit points. Every activity of engagement a student has in SL, whether on the receiving or giving end, you get a certain amount of merit points per period and per term we measure that which is an indicator of their active engagement. We have on the report cards 10 student life categories that measure these non-academic social measures for students, punctuality, honesty, effort, helping each other, etc. It is*

determined by the whole school really, teachers, administrators with the SL Coordinator. There is no social promotion. We have found that there is a direct correlation with conduct and academic performance. It is very rare to find student with flying academic and low social scores. Objectively if you are academically able to do well, you are promoted.

School Characteristics

1. How will the culture of the proposed school be developed from day one with 540 students and over 31 teachers?

- Day one isn't day one first of all. We have discussed that we would love to start this next week but we understand the process will take quite a lot of time. Number one, we have a model that puts us a leg up in getting started. We are looking at getting started long before September – in terms of getting staff on board, assessing students, meeting with students and starting to build programs and plans for students. So day one is really day 120. We will be getting a lot of the work and things done in advance. There is no ignorance to the fact that we have a big job ahead of us and I don't say SABIS has a big job, I say all of us have a big job in getting ready for that.

2. How will the lower and upper schools be different (the academy system)?

- We focused primarily on the K-5 for most of our discussions because that is our reality at this time so I don't know the answer for the high school component.
- We want K-12 system for smooth transition. We don't anyone to leave at grade 6 and get lost in the system.
- The school day will be 8:00 a.m. – 3:30 p.m. for the K-12 grades.
- *There may be some variations as we grow and dismissal and arrival times may have to be adjusted. The methodologies are the same - the point system is the same, the character education is the same. The strength of this particular proposal is the K-12 continuum. There is not an abrupt rupture in a student's educational sequence as we see in many systems. By growing the students from K to grade 12, not only are the students intimately familiar of the process and what to expect year in and year out but so are the parents. The parents become powerful members of the community. They know what to expect. They are smart customers and they can demand from the school. They don't have to relearn any policies or procedures when their child moves to a different grade.*

3. How will parents and families be engaged in their child's education and the success of the school?

- The parents are invited to the monthly meetings. It is a big help - they will know exactly what is going on with the reports - academic and financial reports. We will provide translators – it depends on the students.
- One of the things I am looking for as a member of the board and that I would want from the director of the school – information generated for parents in a way that parents understand it. I may need fifteen languages but it is highly unlikely I will be able to provide in all of those languages. We strive to share information and to make it as understandable as possible for every single parent at the school. One of the other things we wanted is an environment that is welcoming that says we want you here. We want your child here for the entire K-12 experience.
- Parent Advisory Council also. On the administrative end, invited to the board meetings. On the day to day end, the parent advisory council is including the parents in the extracurricular, social, and character building experiences are often not just geared towards the students but parents involved as well. A lot of families move around the city – honestly, I have some employees that move twice a year but they stay within the city. One of the beauties of this program in terms of family engagement is that there is a consistency – a comfort level – continuity of academic and social experience.
- I think it creates a climate where children and parents are very comfortable. It becomes a known entity as they grow with it from grade to grade. The expectations for behavior and conduct are clear. The expectations for homework are clear. The parents and children know it – the children begin to see they are part of a school where they are welcomed and respected. They will be supported by the weekly tests. The results of the tests are more to be used to help the children's progress not to be punitive. I think that is the key. A youngster might see a low test score and may internalize negativity about it. The way I believe the SABIS program will work, you look at the results, you see where the child is, where they should be and the gaps. All of this is communicated clearly to the child. We have a plan to get you where you need to be – this is how we are going to get you there. It is a means to where we can be supportive of students. Before we even open our doors, there has to be an awful lot of communication to the community about the expectations of the school - here is the ultimate goal and here is how we are going to get the students there.

4. Please describe the extended learning opportunities (before school, after school, Saturday Academy, and summer opportunities) How are they implemented, integrated into the standard educational program, supervised, and assessed? Which aspects are fee-based?

- Before and after school is data driven in part because it may be the opportunity for the additional instruction and support that a student needs. Students are encouraged to come early and stay late or to come in the summertime. I would add that – it isn't seen as something negative. The students are more likely to stay and make adjustments to their

personal life plans. This information has been communicated not only to the student but to the families. These are the steps that we recommend.

- *Summer school is mandatory if failing core subjects.*
- *We have in school tutoring and assistance during Intensives and Student Life period. We are aware of the social issues in these communities that we are going to serve and that families come from different backgrounds. Some will not participate in something extra and some cannot.*
- We have discussed this a lot as a board. We recognize there isn't a single answer to the questions.
- The Student Life period can become a tutoring period. Electives are a separate part of the student's schedule.

5. What about addressing the needs of the advanced students?

- The assessments will tell us some of that. As students are categorized to their abilities, there will be concessions made to those students. They will be encouraged with stronger curriculum. Their leadership and other skills will be developed during Student Life.
- Those accelerated students will be involved in the prefect tutoring where they have mastery of a subject matter. They can help other students as a part of the Student Life period. In the classroom, when they are talking about groupings of students – they will be accelerated.
- Springfield students told us about opportunities that they had to accumulate college credits. There will other learning opportunities, other courses such as Advanced Placement classes. Part of the identification of students with special needs, really smart students can also be students with special needs. SABIS is aware of that, we are aware of that. We don't know what we're getting yet until we see the tests. The short answer is that we are aware that they will need assistance on a different level similar to someone on the opposite end of the spectrum.

Governance

1. Are school employees of SABIS or the board of trustees?

- SABIS.

2. How does the proposed board of trustees communicate with SABIS, the EMO that you propose to contract with?

- I actually believe we have two levels of communication: one is with a SABIS representative who deals with the board and the other is the school director. The executive director reports to SABIS, not to the board, but they will also physically report to us monthly though they are employed by SABIS. When we have a problem, we communicate with SABIS.
- *The employees are employees of the school, of the board but the board delegates to SABIS the day-to-day supervision and oversight management.*
- Yes, all school employees are employees of the board. The board has delegated the authority to SABIS to manage the school.

3. Please specify the proposed services to be received from SABIS. What specific management functions will SABIS perform?

- The board has given SABIS the authority to manage the school and the staff.... Curriculum... Facilities... Communicating about the budget... Needs assessments for each school year... Professional Development....
- They will negotiate with food service and transportation ... Decision making about specialists to serve special student populations... Hiring of all staff, including executive director... HR services...
- *The board ratifies the school director.*

4. Please describe how the proposed board of trustees will provide oversight to SABIS. How will the board hold SABIS accountable for student academic achievement, organizational viability, and faithfulness to the charter?

- We may all have a piece in answering this question. The obvious is with the annual yearly progress and MCAS scores and making sure that students are above, because our bar is high, the regional averages in terms of student performance and student outcomes. Budgetary - they have to report to the board monthly and stay within budget. Holding them accountable on a monthly and even more often if necessary, in budget performance. In all of the areas we have talked about together, the things where SABIS would be performing, we would have standards. We would have monthly evaluations in our monthly reporting to determine if they are meeting those standards. We talked about creating an evaluation tool but we don't have one at this point.
- *As a result of the promises made in the application which becomes the charter – these are the items that the board will hold SABIS accountable for. In addition, there will be an accountability plan developed in year one that will establish ongoing clearly defined goals on different aspects, such as academics and enrollment...*
- It is all here. The tool will reflect what the promises are in the book.

- *The management contract does call for an evaluation metric. The board will work with SABIS to come up with clear ways the board will hold SABIS accountable. That has not been developed yet and that will involve legal counsel. Once the charter is approved we can move forward*
- As Jose says, we will work with SABIS but we will also work separately from SABIS as well on that.

5. What is the status of the contract? Have you selected a lawyer?

- We have spoken with outside counsel during the entire process, over the past two years. We have not hired anyone but we are aware of our legal needs.
- We have not signed a contract. We have talked with SABIS and no attorneys were involved but we have consulted with attorneys who have expertise in charter school issues and with a couple of local attorneys who might have an investment in this....

6. Please identify the expenditures in your proposed budget that are part of the negotiated contract with SABIS. (Line items 28, 38, 43, and 47) (Licensing, Management and Corporate Support)

- The budget is a conservative estimate of what will be spent.
- Line item 28 – Management 6% fee
- Line item 38 – includes text books from SABIS but also paper, supplies, photo copying for instructional purposes that type of thing.
- Line item 43 – Licensing 8% fee
- Line item 47 – All school staff, not corporate SABIS staff.
- If you review the budget history at the other two SABIS schools in Massachusetts, you will find that the budgets are very stable, viable, SABIS never puts forth to the board a budget that are risky in nature. We make conservative assumptions. Even with the facility, for example, we are factoring in a \$15 per sq. ft. amount. That is high but not knowing the future we are being conservative.

7. Define ‘Total Tuition Funding.’

- \$11,037 per pupil - they estimate that is what the state of Massachusetts will provide. The fee does not include entitlement or private grants. Those funds stay at the school.

Facilities and Finances

1. What is the status of your facilities search?

- *We have located facilities that would be feasible but that would require extensive renovations to be negotiated with the landlords. We don't have financing identified at this time. We have talked with a national organization, charter school development organization, to help the school identify financing. We are looking to identify local financing first and foremost. If we can't work with local banks then we will work with national organizations. We know that there are more building options in neighboring communities but our focus is Lowell.*
- As a board member I want to be in Lowell.

2. In your budget, you indicate deficit spending during the pre-operational year and year one, which totals over \$200K, where in the FY13 and FY14 budgets does it reflect repayment?

- You see at the very bottom line that it is off set by the following year surplus.
- We are looking for grants or money that someone will just give to us.
- *We will have a surplus and we do provide/make available a line of credit from SABIS to cover salaries during the planning period.*
- There is interest that would be involved in a line of credit.

Management

1. How do the staff evaluations work?

- *To clarify, there is no SABIS staff at the school – they will all be school employees and paid for by the school, covered by the tuition payments.*
- *School director reports to the board on a monthly basis at the board's regular meeting or however often the board meets. The business manager will report to whatever budget or finance sub-committee there might be. SABIS will also report to the board on a regular basis as well.*
- *The staff and the executive director will report to SABIS, the executive director to George Saad primarily (VP of Operations). It is in an evaluative capacity.*
- *The board will have their evaluation criteria and SABIS will have its input in evaluating the director as well. The reporting capacity – academic outcomes, finances, assessment, staffing, etc. We have a standing agenda that I go over with the director on a weekly basis. We have a standing weekly relationship.*

2. How will the board fulfill its statutory and fiduciary responsibility to exercise oversight and control over the proposed school's resources and operations?

- Our agreement is to go to a mediator if we end up toe to toe and can't resolve a disagreement and we have that in the contract.

- *The board will exercise total control, in the statutory sense, through approval of policies and approval of the budget which ultimately drives everything. You can't do anything in a school without a budget that has been approved. The board has a major say in exercising its fiduciary responsibilities. Through its review and approval of the budget and on-going review of budget versus actual reports. Through its review of the audit which is performed by an independent auditor that the board hires. Also through their on-going meetings, their regular board meetings - they have the responsibility to ensure through their communication with SABIS and the school director to ensure compliance with the law, any reports on compliance, such as CPR or special education or other internal documents done by the state. The board gets a copy of the report and will then have a major say in understanding what is happening at the school and then helping SABIS and the team approve a plan for addressing any findings.*

3. Does the board have fundraising goals?

- Our next discussion, if we get approved...
- *In the SABIS experience we hope for it, but we don't rely on it for the success or failure of our program. It is great if foundations can step up. We will provide the educational program as described in the confines the state provides charter schools. Whether it goes up or down. We have demonstrated that in Massachusetts already. That is our model nationally. We educate the students on what the state provides.*
- We would seek grant funding for other things that the board would consider important, such as parent education.

Special Student Populations and Services

1. How are you going to evaluate your program for English language learners and students in need of special education?

- According to the instructional model, we are getting feedback on all students, whether they have Limited English Proficiency or special needs, and we are addressing their needs specifically as a result of the weekly assessments. We are using appropriate tools.
- We are charting the progress of the students, not as individuals, assimilating back into the regular classroom. And the time period also would be part of the report that the director would provide to the board. We will be watching closely the time it takes for students to return. As for individual students, their performance on the weekly tests and their grasping of the basic concepts. The spiral learning concept - there are basic things that everyone needs to know and how quickly they know that.
- If need be, there will be an opportunity for those students to be taken out of class on a regular basis and have provided for them sheltered immersion.

- What we heard from the directors was that every plan for the individual student with special needs is performed as according to the IEP. Exactly what is required by law is done.

Enrollment and Recruitment

1. Please explain your rationale for the proposed school's size and growth strategy.

- From a developmental perspective, we want to be successful so if we can start here and add then we are creating that culture – we are creating everything we've been talking about for the past two hours. If it wasn't a K-12, we wouldn't have the same opportunity. From a developmental perspective, start early and build, it is just more rational.
- Build all of the values that SABIS stands for. Own the school.
- It is financially the number through SABIS' assessment that will pay for itself – that is also a figure to make sure that the school is successful.
- We have a school in Lowell anyway and we can only have so many charter school children.

Capacity

1. What are the proposed board members' expectations about the work required during the planning year and the first years of operation?

- I have just retired.
- We have a lot of work ahead of us.
- I don't think we have an answer for you but we know a lot –the one thing I think you can sense is our passion and our passion will get us through it. We are not ignorant on that one. There were a few questions that we don't have the answer on but we know the answer to that one. It is not going to be pretty but it will be worth it....

2. What is the board involvement with any of the hiring of school staff?

- We are involved in the hiring of the school director but not the teaching staff.
- It is not in the contract but I am an HR person by trade. I'll want to see them. I want to see everything – Teacher selection is huge...