

Argosy Collegiate Charter School

Questions as derived from panel and documentation review

Note: The interview summary is not a transcript of the interview audio. The order of questions and responses within the summary may not reflect the chronology during the interview.

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

1. How have your personal and professional experiences led you each to participate in proposing a charter school in Fall River? How did new members come to join the group?

- Chandra Hawley Orrill – member of proposed board of trustees – I am resident of Fall River and an associate professor at University of Massachusetts-Dartmouth (UMass-Dartmouth). My research is on teacher knowledge and how teacher knowledge influences classroom practices. I'm also the chair of the STEM (science, technology, engineering, and mathematics) education teacher development department, which does all our content licensure programs at UMass Dartmouth. I joined the proposed board because I have a fundamental belief that schools should be places that open doors for students and allows them to have many opportunities when they choose their careers. Living in Fall River, I know that there isn't enough choice for Fall River students. There are very few public choices there. I thought Argosy, which is a home grown school, would be a nice addition to the educational landscape. I look forward to exploring a partnership between UMass-Dartmouth and Argosy to build a coherent K-20 pipeline.
- Gary Vierra – member of proposed board of trustees, proposed treasurer – I am 32-year banker. I've spent most of my career working in small community banks in the Fall River area. I've spent many years with the banks focusing on many aspects of community services, particularly working with our youth. I've spent a lot of time working on financial literacy programs for elementary, middle school, and high school children. We've also worked with junior achievement teaching at the elementary and middle school level. One of things we feel, as community bankers, is that our success is directly impacted by the success of the community that we serve. Our children, our youth are our future workers, customers, and so forth. We really have a vested interest in them being successful in our community. I jumped at the opportunity to join this board because it's a great opportunity for me to give back to the community and influence our youth. I bring 32 years of financial experience to the table, as well as experience in technology and bank operations. I look forward to making the best use of the public dollars that are entrusted to us and to impact the lives of the youth in the city.
- Michelle Pelletier Colberg – member of proposed board of trustees – I am a commercial real estate developer in the city of Fall River. My expertise is in renovating the historic mills of Fall River; I have 17 years experience in that area. I bring to the table experience in taking smaller tenants and putting them into larger environments and helping them expand. This is something that Argosy is looking to do with the slow growth model and I've working very closely with the budget committee on this to make sure that the budget is accurate. I also have extensive experience with boards and governance. I've been on the Fall River Board of the Office of Economic Development for the last 12 years. I also have experience with the Fall River United Way, and the Fall River Area Chamber of

Commerce—where I chaired that board in 2006. I am a mother with two children and I've worked with the city of Fall River for most of my adult life. I believe in the city and believe it is strong and viable. I also believe in the mission of Argosy and believe that Kristen will be a good leader for our community.

- Eileen Callahan – I am a director of new school development with Building Excellent Schools (BES). I've been with BES for a little over a year now. Previous to that I was at Boston Collegiate Charter School for 15 years. I was a founding teacher, founding high school director and founding chief academic officer. At BES, I support schools in their planning year and in year one to ensure that they get off to a strong start. If Argosy is approved I will work closely with Kristen and her plans: hiring teachers; planning professional development for teachers; and curriculum development.
- Kristen Pavao – lead founder, proposed school leader – I am a founder and proposed Executive Director of Argosy Collegiate Charter School. With the support of the BES fellowship, I spent a year studying high performing charter schools in order to develop the skills to build a team to successfully govern Argosy. I was an educator in Fall River for both the district public school system, as well as the local charter school in Fall River. I was frustrated with the lack of conversation around college readiness and college completion and being ready for the 21st century job market—across all stakeholders; parents, children, teachers, school administrators, and guidance counselors. I wanted to see what I could do to broadly impact and change those aspirations across the city. BES has given me a great foundation and great access to high capacity charter school leaders across the country. I am firmly invested in the city of Fall River and I am excited about the future.
- Fred Tirrell – member of proposed board of trustees - I do not live in Fall River, but I have spent 55 years in education as a teacher; 30 years as an administrator, and over 20 years as an assistant superintendent and superintendent, as well as associate head of a private school. I'm also an adjunct staff member at Regis College and a full-time associate professor at Bridgewater State University for the Graduate Education Program. I've seen many years on a variety of boards. I've served on the Charles River Association for Retired Citizens Board and the Commission for American International Schools Abroad board. I served on a board a private school in Waltham. I've also served on the Massachusetts Cultural Council, through gubernatorial appointment. I also served on the board of the Sturgis Charter School in Hyannis. I served on their board from 1998 to 2003. I was contacted by Kristen who thought that my background with direct educational experience would be a good addition to the board. I met with her and the board and they are an extremely impressive group of people. I'm not from Fall River, but I think it is unjust that Fall River is a Gateway City and only has one charter school.
- Teri Theberge – member of proposed board of trustees, secretary – I've been a resident of Fall River for 30 years. I work at Southcoast Hospital Group in new medicine technology, in a few different locations, including in the city of Fall River. I come to the board with a unique perspective. I have four children, ranging from ages 16 to 32. My two older children attended the district public schools and my two younger children attended the public charter schools. I am the proposed board secretary. I worked with the academic achievement community to develop a health and wellness program for our

school. I was very concerned with the quality of education in Fall River and that is what drew me in. I believe the students of Fall River deserve an opportunity to attend a college-bound school such as Argosy Collegiate.

- Domenic DiNardo – member of proposed board of trustees – I’m a business development executive for Pearson Learning Solutions, where I work with colleges and universities to build quality and accessible online learning programs for students. I bring 8 years of experience in education technology and tech integration into schools to the board. In working with college administrators across the country, a consistent theme that is concerning is that almost 60% of incoming freshman are not college ready and need to take remedial classes. This problem seems to persist in low income and gateway cities, such as Fall River. I believe that effective technology implementation can help personalize instruction and learning experience for students. I’m excited to bring my experience to this already stellar board.
- Nancy Martin-Bernier – member of proposed board of trustees - I’ve spent more than 36 years as a teacher and administrator in the Fall River public schools. I joined this board because many students that I’ve served have a similar background to me, and I can really identify with them. My passion is to develop safety nets for children in the city of Fall River. We are well aware that 67% of potential students will not be proficient in ELA, and 70% of students will not be proficient in math. In addition, I also look at social emotional issues. In September and October of 2013, there were 122 suspensions in two months in Fall River. That is a great concern to me and the board. We want to have a strong support and safety net system.
- Sue Walsh – I am the Chief Academic Officer at BES. I bring 21 years of educational background to this group - 20 of the 21 being with charters and 10 years with BES. At BES, we spend most of our resources trying to find leaders that are entrepreneurial enough, driven enough, focused enough, and committed enough to do this work well for our children. We were lucky to find Kristen Pavao. We found her at a training session. There were about 120 people, and Kristen stood out. Myself and the CEO decided that we needed to meet with her, and we discovered that there was a hunger and focus within her. We feel really fortunate to have found such a great leader in Kristen.
- Cynthia Goncalves – I work for Central Source, which is a company that provides business management for charter schools. The dedication of the board has made it enjoyable to work with Argosy to build good, strong financial budgets and projections for the school. They are very conservative and have addressed all of the right issues.
- Richard Farmer – member of proposed board of trustees – I am the vice president of commercial lending with Bristol County Savings Bank. I have over 35 years experience in the banking industry, mostly in commercial lending. I have many responsibilities with the bank; I manage a \$40 million portfolio, and within those responsibilities is the financial oversight of our borrowers to ensure positive operating performance. I bring financial management experience to the board. Along with that is a passion for education, which aligns with the bank’s passion: to support education in the communities we serve. Not only monetary support; but also participating in financial literacy programs, which is something I’ve done in the past and something I plan to continue to do with Argosy. I also bring connections to the business community, as I’ve worked in the community for

20 years. I've seen an evolution of the educational needs of the businesses in the Fall River community. There is an expansion in high technology engineering and manufacturing, as well as healthcare and financial. In order for these businesses to continue to expand, we need a higher education workforce, which is something we lack currently in the Fall River Schools. Argosy with help satisfy that.

- Lisa Rocha – member of proposed board of trustees, proposed vice chair – I've been an attorney in Fall River for the past 6 years. My contribution to the board is legal analysis. I joined the board in August 2012 because education has always been important to me. I was born and raised in New Bedford, which was much like Fall River in terms of demographics and struggles, and I couldn't think of better way to give back to the community than to help bring a public and quality education choice to Fall River. I'm the proposed vice chair of the board and the proposed chair of the governance committee.
- Paul Burke – member of proposed board of trustees, proposed chair – I have over 37 years of business experience in the city of Fall River, 25 years of owning my own business. We now have over 20 employees. One of biggest goals has been hiring people within the city. I have 35 years of experience on numerous boards, including the Chamber of Commerce, where I was chair in 2007. I've sat on the education committee of numerous other boards for years as well. If not for the educational opportunities I received, I would have gone nowhere and wouldn't be here today. I've always wanted to give back to the community. I've been a volunteer fire fighter for 35 years, so I've been able to give back to the community on an individual basis. But, by being part of Argosy, we can have a positive impact on hundreds of kids and hundreds of families and that is important to me. The other part is what we are seeing in the district and working on this board has really focused our attempt to helping those kids. I've been honored to be asked to be the proposed chair. Since we've last met, we have been acting as a proposed board; we meet with agendas, we take minutes, and we voted on the application you have in your possession—both on the committee level and board level. We have increased our capacity and I think you can see the difference based on who you see here today.

2. How will you know if your program has the level of rigor and relevancy required for preparation for a four year college degree?

- We think about being a very data-driven organization, which means we need to assess and personalize the individual academic plan for each student. In order to know if we are being successful, we need to know how students are progressing, growing, and learning. We do that through teacher evaluations, we do that through assessment, we do that through our weekly collegiate reports and tracking students' progress. We are continually thoughtful about improving based on the data. That is where our relationship with high-performing charter schools is helpful, because there are a lot of schools doing a great job and there is a lot to learn through those relationships.
- We will also have a student support team. So, if our data shows that a student is consistently falling behind, the student support team will develop alternative strategies before the student fails and provide additional support to the child.

- Common Core allows access to a national network of leaders who are a few years ahead. So we will take advantage of that.
- With support from BES, we'd really be looking at our internal assessments and seeing how they align with the high degree of rigor our country is asking of our children.
- I'd also add that we decided that we want to start with one grade to really ensure that we did it right and have a successful launch.

3. What skills and knowledge are needed for a 21st century global economy? How does your proposed school address these goals within the educational program?

- In thinking about how to prepare children for the 21st century global economy, we think about a variety of different skills, one of them is the academic skills and the content knowledge to be prepared for college and the job market. We think about what is required for the 21st century job market and what is required for college acceptance and backwards planning from that, including graduation and promotion standards as well. Some of the other skills that we think are very important to prepare for the 21st century global economy are social skills and problem-solving skills, as well as the academic skills. We think about all of those skills coming together to form a complete package; where an individual is prepared to take on and consider different options and understand opportunities that are available and how to make those decisions.
- To add to that from a practical standpoint, working as a banker, the global economy has really impacted the industry over the past 15 years. When I started in banking, there were no personal computers and banks really only served their communities. When you look at the skills needed in the banking industry now, where banks are dealing with organizations across the country and other countries, there is increased connectivity. So looking at our students today, technology is going to be critical. They need to have basic technology skills. That means being able to use technology for financial literacy, being able to find information and being able to make presentations and so forth. Skills like that are becoming more and more important.
- Part of our program is teaching organizational skills and financial literacy. We are also integrating the science, technology, math, and engineering as human and challenging students to really apply their knowledge to real world situations.
- Technology is integrated seamlessly into the learning experience. So in a STEM course, for example, they are learning the principles of science, mathematical reasoning, and the principles of engineering through hands-on explorations that require the computer. Maybe it's to model something; maybe it's to create of a model of data; maybe it's to run some virtual experiments. It is seamlessly integrated. There isn't a "technology time"; technology is part of how the learning happens.
- Technology should be used as an enabler and not as the core of what the instruction is.
- In addition to the technology, Argosy has built into the mission building character values, teaching these children great morals, values, and responsibilities.

- There is also a financial literacy part. I see young people all the time that don't know how to handle money and have no real life experience financially, so that is an important part of Argosy as well.

Educational Philosophy, Curriculum and Instruction

1. Kristen Pavao: The BES fellowship involved professional development on curriculum design and development. Describe how the BES fellowship experience has influenced the processes and procedures that you intend to implement at the proposed school related to curriculum.

- Some of the experiences around curriculum development and design were really enhanced by my experience of spending a lot of time in high performing charter schools; to learn what they do successfully and replicate best practices. We think about backwards planning from college and career readiness as the platform for curriculum development. We have partnered with successful charter schools to have access to those shared resources, in particular, for example, working with Roxbury Prep around their CAT (Curriculum Alignment Template) plans. This will be very beneficial for teachers to help support them in their development and lesson planning, for gradual release, for thinking about what teachers and educators should be doing, and how to support students. Also, thinking about, for example, the increased development and expectations for Common Core, PARCC (Partnership for Assessment of Readiness for College and Careers) and, in particular, the development and the focus that Boston Collegiate Charter School has focused on. So thinking about curriculum is all tied into the backwards planning and readying our students for college and career. Some curriculum we will modify, some we will purchase, some we will access, and some we will write ourselves over time and modify and continue to be thoughtful about; so that we ensure we are satisfying student needs and providing that path to college and career readiness.

2. Describe what teaching methods and strategies will be used for supporting a wide variety of student needs within the classroom. How will Saturday Academy and Summer Academy be developed to meet the needs of learners? What instructional staff will participate? Describe in greater detail.

- Lemov's teaching strategies and techniques are a great foundation to support teachers to develop their own teaching methodology. We have our philosophies around gradual release. So, thinking about creating a lot of structure and set expectations, so students know what is expected of them on a daily basis and what they can expect based on the decisions they make. The expectation is that students will become more and more independent over time, setting them up for success in college. Also in thinking about teaching methods, thinking about lesson planning for example and double planning. Having teachers consistently thinking about, not just what they are doing, but also what students will be doing at any given moment and to support that. With regards to college preparation and career readiness, we know that 2/3 of our students are going to be behind in ELA and mathematics, so we created a program with 90 minutes of student support that is data driven. We also think about other supports that will help students and teachers

become more successful, such as the Summer Academy. At the end of the year, if students are struggling, they have that option in the summer time to repeat those skills so we can avoid retention when possible. There is also the Saturday Academy for students who need additional time for support in reading and mathematics.

- One thing we want to make very clear is that we are not just focused on content in these courses, we are focused on the practices as explained in the Common Core and in the Next Generation Science Standards, so a focus on what is going to be going on in the classroom is also helping the students understand those practices; because in the end that is what really matters. When I talk to college scientist and ask what they want when the students come in, they say they want them to understand the practices, not particular contents. So we know that is a vital part of what is being taught.
- Once Kristen's team is hired, we'll focus on making individual coaching plans for each teacher.
- We fully expect to teach all the teachers in the summer on the latest standards so that our teachers will be up-to-date.
- Saturday Academy will be implemented in the first year, every Saturday in September because we will have data on all incoming students and we will need that extra time to support students. We also need the time to determine reading and writing levels and to create flexible groupings to support students. While our goal is to support all the needs of every student, we do know that, given the skill gaps in Fall River that we will need that extra time. In the summer time, a lot of that time is also for culture building, expectations for school, how students should behave, how they should manage themselves, and how they communicate. The DREAM values, for example, will help frame up their expectations, both academically and socially.
- We will set a rotation schedule in order to staff Saturday Academy. We will be thoughtful to make sure that teachers are getting time off and the support that they need to be effective. In terms of transportation, we know that we have to partner with the district. We are prepared as a board to provide our own transportation services should we need to, to make sure students can get to school on Saturdays.

[Follow-up: Could you provide some extra detail regarding implementation of the 90 minute remediation time within the day?]

- During the 90 minutes we will be using the flexible group model. We will have 2 English Language Arts (ELA) teachers, 2 math teachers, a STEM teacher, a social studies teacher and all administrators. We'll have a council as well, working with students during that period. This will be a very personalized approach. We may have a child working for 30 minutes with a special education teacher. We will have Level 1 and Level 2 ELL (English Language Learners) students working with the ELL teachers. We may have them do that for 90 minutes during that period. We will use our data to break our students up into small, manageable groups. We'll also use technology during this period for students to do project-based learning. It'll be all hands on deck during this period; everyone will be working this period. We'll have the 14 staff members for the 100 students. We may use software to enhance our mandated ELL instruction.

- We'll also be focused on students that are at grade level and above grade level, not just students that need support. We'll really try to challenge those students and continue to engage students with particular affinities with certain subject matters. Thinking about utilizing this time period in 6 to 8 week chunks; realize the goals and then move on.

3. How is academic support different at the middle school and high school grade levels?

- With the decision to back fill into the 9th grade, a big component of that was how we support students coming into the 9th grade who might be 3, 4, 5 years behind in reading and math. We think about the middle school model and that 90 minute, 90 minute, 90 minute schedule every day. We would need to structure something similar to that for incoming students or students still struggling at the 9th grade level. We'd have a two-tier model where we are replicating that same model at the 9th grade level but ultimately the rest of the program would be based on 45-55 minute periods like a typical high school program. We'd hire a reading and math interventionist to help support struggling students or new students. We have a collegiate skills program to help support students through high school expectations. We'll also be thinking about what motivates high school students and support social development, which needs to look different than the middle school.

[Follow up: In your planning for the proposed backfilling in ninth grade, have you thought about how many new ninth grade students you may have? What are your thoughts on anticipated attrition for the proposed school?]

- Through our relationship with Boston Preparatory Charter School and Boston Collegiate Charter School, both have a middle school to high school model, we felt pretty comfortable with a 10% attrition rate; so 10 students. There could be another existing 10 students still struggling academically and having that dual track, particularly around mathematics, to support those struggling students.
- We've also talked about identifying those 10 students in April and meeting with them through the summer and trying to remediate some of their gaps.
- The attrition rate at Atlantis is very low and it's difficult to know if we can carry over to what we might experience. There are not a lot of options in Fall River for college prep high schools, so we think it could be 10%. But it's likely that is could be less and we will make adjustments accordingly.
- If we end up retaining more students than we expect and don't reach the 10% attrition, then we'll need to make some modifications on lower grades. We'll make that determination when we see what our sibling count looks like as well. So we'll have to be very exact about the student population, our sibling waiting list, our student enrollment and planning for the future. I think we will have a good sense in year 2, 3, 4 as to what our attrition rate is going to look like.

4. As the proposed school leader, what strategies will you use to establish a professional community of reflective practitioners amongst the faculty?

- Fall River doesn't seem to attract many new educators, so we're fortunate to have some Teach for America corps members in Fall River. We've worked with those core members and even those out of the two year program, regarding possibly joining Argosy Collegiate. We have a number of folks interested. We know that we have to hire the best educators possible. It starts with mission fit and mission alignment; and do you believe that all children can succeed and are you willing to do whatever it takes to get there? This includes being thoughtful about observation and the feedback cycle and practicing continually what you do well and improve in areas that need to be improved. We have a relationship with the University of Massachusetts, which we hope will be an incredible teacher hiring pipeline of highly qualified educators. We hope to have a similar relationship with Bridgewater State University through their teacher certification program.
- UMass Dartmouth has recently undergone a reevaluation of our program and part of the criteria we wanted was to ensure that our teachers are reflective practitioners. So, teachers will be ready and perfect for a position at Argosy.
- An experience I had as a teacher at Atlantis Charter School was with the teacher development process; partnering with Teach for America to help new cohorts become quickly effective at lesson planning, developing relationships with students and collecting and analyzing data. We have time embedded in our schedule for these things in our program. The debrief is very important for this process.
- We believe firmly in constantly talking about our mission statement and embedding it in our school.
- It's not just about improving our teachers. It's also about retaining our teachers and I think with our support system, teachers are going to want to stay in our environment.

5. How are teachers supported by school leadership and program design to create sustainable working conditions within the anticipated 9.5 hour day Monday through Thursday?

- Part of what I've worked on over the past year was engaging in conversations with educators around what it is that is important to them in terms of pursuing a job in education and then accepting a job in education. The bottom line was really about the mission of the school and the training and support provided for teachers. It wasn't salary and it wasn't benefits. It was also about being a part of a startup organization and the excitement involved in that. We think about continually growing our organization from within and building the bench.

[Follow-up: And you don't have any concerns about the salary parity?]

- We do have concerns about salary parity. Part of the process of determining a competitive wage was looking at the Massachusetts Public Charter School Association Salary Survey, which does include Boston. We are at the lower end of that range, but we hope that over time as student body builds and revenue builds to have a more competitive salary. We're hoping that the whole package is attractive. We believe, given our research, that we can hire folks.
- It's important to note that the standard of living in our area is much, much lower than it is in Boston. A lower salary in Fall River is going to give a much higher standard of living in Fall River. So, I think that is important for people to know.
- We do think it'll be challenging, but we also think that job satisfaction is going to be a large part of the hiring process and keeping educators. There is a strong dialogue in Fall River about the lack of support for teachers.
- We're also focused on having a clear career path for teachers, which isn't often the case; which grows into the satisfaction piece.
- We have found and talked to very qualified individuals.
- We do have a little bit of a contingency built into the budget, so that if we need to we can free up some money to pay educators.

Assessment, Promotion, and Graduation Standards

1. One of your 8 core beliefs is data driven instruction. Please describe your approach to the use of student data from assessments. How will your use of assessments ensure students' learning needs are known by their teachers, and addressed through targeted instruction? How do you plan to support the use of student data in teacher practice?

- Prior to the BES fellowship, something that was very important to me as an educator was understand where every child was at any given moment, so I created standards-based assessments so that I would have that raw data for interventions, or for re-teaching, or for looking at problems in the assessments. That was a critical component of my efficacy as a teacher and also for student achievement. The assessment is key in the school program. From there we've been very thoughtful about what are the best assessment tools that we have access to. We have a negotiated contract with Achievement Network for standard-based assessments, which we think is a good tool. The assessment allows us to know where each student is at any given year, but particularly in year one so that we can develop and individualized learning plan based on the standards and then keeping track of that on a weekly basis. We'll also develop our own internal assessments for end of year benchmark and also for end of trimester and backwards plan from that.
- All of our teachers will have two data-planning meetings per week, for 90 minutes in length each. They will be having the meetings with the director of achievement where they will be looking at the data and deciding what is next. We also have a 90 minute support period every morning for all students. We will use the data planning meetings to

support students and plan instruction. In addition, we'll also have common planning with special education and ELL teachers, which will also use that data.

- To us, data is only as good as the actions you can take on it. We plan to use School Brains as a student information system. I think that is powerful because of the transparency piece on all sides: the board, academic committee, administration, parents, students, and teachers.
- Assessment is a two-pronged fork in our program. One is to assess and track student performance and learning, but the other is around that piece of how we are doing as a school.
- With regard to our mission of developing character values, it isn't easy to have an assessment around that because we are talking about character values that will be mostly explained when these children become young and mature adults, but it is extremely important that our school help develop those values because it will have a great impact on their lives.

Special Student Populations and Services

1. Throughout the application, including in your mission statement, there is an articulated commitment to diverse learners. How do your recruitment efforts within the community support this commitment?

- Student enrollment in our community outreach and recruitment plan has been about reaching all parents and all families who have a fifth grader. That has been our comprehensive focus. We've set goals for student populations; special education, ELL (English Language Learners), high needs and low income. We have connected with all families in the Fall River housing authority. We have connected with ELL families through Health First Family Care Center and the Flint Association. We continue to connect with other student support services and youth support services across the Fall River area to reach special education students as well. We are very clear in our recruitment efforts that we are a school for all children and educate all children. When we look at our data, we can see that our subgroups are profoundly struggling, so we're dedicated to meeting those goals. We will track our goals continually to make sure we are meeting our enrollment targets.

2. How was the special student populations and student services section developed? What expertise does the founding group have presently regarding English language learners and students with disabilities?

- I have a previous relationship with Nancy, who was my principal when I worked for the Fall River public school system and I knew she was an expert—she really got the job done with special education and ELL students. We worked together on the development of the program. We went right back to the application and the criteria and expectations that Department clearly wanted to see. In particular, we focused on how we will be successful, not just the goals. We also partnered with our special education and ELL experts across the state and formed partnerships with high-performing charter schools,

particularly in the subgroups that we're focused on. We partnered with Dr. Liz Harris, who we are developing a relationship with. We were thoughtful about partnering with experts and having them cross reference our program with their real world experience, as well as from a legal and compliance perspective. We came together as an academic committee and reviewed the feedback we received from outside the group and put that into action through our series of edits.

3. Please describe and explain how services for students with special needs will be delivered within the school day and the proposed staffing to implement this programming.

- First of all, we would like to provide the least restrictive environment that we can. The main focus of support for special education will be inclusion. We have provided that one academic support period for all students and certainly special needs students may get help from special needs teachers. But they may not if we've already satisfied their part of their IEP (Individualized Education Program), they may get support from a math teacher. We have allocated some time in the afternoon for a pullout period. If students need pullout and we have looked at whether or not our staffing for special education in particular is going to be high enough—and as a board we've discussed that if we get a student who has severe needs we may have to look at our staffing again and adjust that. We have to hire a paraprofessional. We may have to hire an additional special needs teacher. We recognize that we don't know yet the IEPs that we'll see, but we also recognize that we have a responsibility and we will meet whatever those IEPs say. As far as ELL, we're predicting 7 students. I think that number is low, given my experience as an educator. So if we start at 7%, we may go up a few percentage points. I will advise Kristen to look at all the records and determine for our own school viability whether these students are ELL. I feel that our staffing for ELL is appropriate. We have one person, again though, for that position, ideally I would love to hire an ELL teacher who is also special needs certified. We hope to get two people like that, but I'm not sure if we will.
- In relation to the overall staff, the director of student supports, the special education and ELL teachers, and how that staff grows over time. That will absolutely be affected by the numbers of students that we enroll for special education and ELL and what those disabilities require for year one. So that is our first go-to once we have identified our students.

[Follow-up: What is the plan for an English Language Development Curriculum?]

- Our curriculum will be based on the frameworks. It will be direct explicit instruction in English language development in a developmental way through listening, speaking, writing and reading. My philosophy is using standards through instruction and developing the curriculum. However, there are some very nice supplemental programs that we would use in addition to our mandated hours; one of those would be Lexia Learning for All Students. One might be Rosetta Stone for English language development. As far as purchasing an ELL/ESL program, I don't anticipate us doing that because I think it's the direct explicit instruction and having high standards and presenting the English language in a very explicit way.

Enrollment and Recruitment/Facilities and Transportation

1. Proposed board: In your application, you explicitly state that if a facility commitment and sufficient intent to enroll forms are not in place at authorization, the proposed school will extend the planning period and open in 2015. What is the status of your facility search and enrollment interest from families?

- A year ago when we were here, some of those same concerns were brought up. A major concern as a board was, can we make the 2014 opening? After meeting and discussing and the work we've done over the last 10 months we know that we can meet the 2014 opening. We built a very conservative budget. Our Request for Proposal (RFP) for our location is out and advertised. We expect to make an award for our location by March 1st, possibly by March 15th at the latest with a 3-4 month build out.
- There is a lot of space available in Fall River. It's a buyer's market. It's common for landlords in Fall River to only rent out the space that is needed by tenant. I do a lot of first right of approvals on additional space. We've identified three properties. One is an upper floor building in downtown Fall River. The reason we like that one is because it is an old school; it's pretty built out. It's a little larger than we need but they've quoted us at about 70% of the value that it should be. We see that as a very viable option. We identified another space on a first floor downtown that we like that has future growth for first, second, third, and fourth years. This one is a larger space though and it's more of an open-floor plan. We can do a full build-to-suit according to our exact specifications, but there is a build-to-suit that we have to account for. The third location, which is in the Flint section that we really love because of the location; it's more toward our demographic, but it's not entirely ready for occupancy to be quite honest. I'm nervous that it won't be ready in our time frame. There is a lot of space available and with the RFP out there we may see some more available spaces soon.
- The number of our intent to enroll forms is up to 53. We partnered with a marketing firm, who is doing pro bono work for us; working on targeted direct mail campaigns, for example targeting families making under \$40,000/year. We have at least three more campaigns to go. We also believe that families will be making decisions around May, so we are excited about that opportunity as well.
- With regarding to other schools expanding, we are different than they are in that we have a slow growth model and we think that is the best model to be. And obviously, we don't know who is going to be approved. We believe there is going to be a lot of demand in Fall River because that is the way it is going in Fall River. People in Fall River want the choice.
- Also, we have a college preparatory mission. Over the last year and a half, the board members have been talking to many families around the city and it's a huge differentiation from what is out there.
- I also believe that we are more ready than Innovation. They put their application together in a very quick time frame. We are further along than they are, we are ready. I think we pushed Innovation Academy.
- The only opposition we had last year are now supporting New Heights; it's the same people. We are college oriented and there is high demand for that in Fall River.

- With regard to our 53 intents to enroll, we really aren't worried. All our direct mail says that the lottery is in March, so now that the holidays are over families will pay more attention and we'll see the number jump. We expect more than 100.
- There's quite a waiting list at Atlantis also.
- Public middle schools are in the paper every week because of over enrollment and suspension rates. As these issues are publicized I believe we will get more interest.

Governance & Management

1. Proposed board: Tell us more about the anticipated need for fundraising and the experiences of proposed board members with reported expertise in fundraising.

- Speaking as the chairman of the development team, we designed it so that we have members of the board reaching out to members of the community who have connections to various foundations that we can tap into. Particularly, our focus is looking short term and long term for capital expansion. One of our primary focuses is to determine what our capital plans are and building fundraising campaigns around that so we can meet our projections.
- Based on our research and conversations that we've had with high performing charter schools we've put together a goal of \$300,000 to raise for this year. We've shown our capacity to do that with our long term commitment, Amelia Peabody, and all this stuff. We've also had deep conversations with other non-profit organizations that support schools and much more. We've also had conversations with an experienced development professional to focus his efforts for preauthorization of year one to continue that development efforts with the \$300,000.
- That professional that he mentioned, also has experience with other charter schools and raising funds for charter schools. We've also met with the Rogers Foundation, which is a foundation in Fall River that is dedicated to grants for education only in the city of Fall River. Since there aren't any other charter schools besides Atlantis, I think we are in good position. And also Amelia Peabody has made a commitment in the pre-year, but they are going to continue with us in the future.

2. Proposed board: Describe how Kristen Pavao will be held accountable by the board in her role as Executive Director.

- There is a clear job description that will be used to evaluate her performance as the year goes on. I was very impressed with Kristen particularly with her background as a teacher and also her plan that she made for herself in order to become a school leader and her association with BES and reaching out to other charter schools. She is so passionate and committed.
- In terms of her yearly evaluation, the board will have a teacher survey, a parent survey, and also the academic and financial dashboards that we look at every month will be taken into consideration. The governance committee will prepare a written evaluation and the board chair will sit with Kristen and it will become part of her permanent file.

- In addition, we are aware the Massachusetts has an evaluation system for the school leader. We will be looking at that as a board as well.

3. Proposed board: Tell us about the process the board will use to evaluate its own effectiveness as a governing body.

- The board will develop its own internal evaluation process through surveys.
- If there any problems with a board member, such as attendance, the board will handle it on an individual basis. It's up to our education director to run the school and it's up to us develop the policies and we will do that through self evaluation also.
- We are going to have to set goals for ourselves as a board, which will help us decide if we are being successful.
- It's clear that we'll have a strict set of bylaws in place that will completely govern who is doing what, who prepares what, and our expectations at board meetings.
- Also, we'll look to our accountability plan to see if we are doing what we set out to do. Are the school's academics successful? Is the school viable? Are we being faithful to our charter and our mission?
- Over the last 8 months we have shown that we are goal oriented and that we are capable of meeting those goals.

4. Tell us about the establishment of the Advisory Council and its role if chartered.

- The idea of having an Advisory Council was to have access to a group of individuals who could support the work outside of the board and outside of governance, particularly in thinking about capacities outside of Fall River. We developed a relationship, for example, with Julie Almond. Julie had to step away from the board for personal reasons. She is very much interested in joining the board again in the future, so we invited her to be on the advisory council. Louis Petrovic has been very helpful in networking and board development. He has a strong history in education in Fall River through UMass Dartmouth. Greg Torres has been a good partner as well, to discuss gateway initiatives, thinking about populations in our city, and how we can continue to develop them; particularly around workforce development and college/career readiness. Michael Goodman has also been very helpful in helping us connect to and build the relationship we have with University of Massachusetts and also in board development, as well. In thinking about going forward with the Advisory Council, we certainly would like to add a board member or two from the charter school landscape. I do have access and frequent communication with people from charter schools that we mention pretty frequently and we'd like to continue that work to identify somebody who could have a more significant role over time. Going forward we need to make sure that the capacities of the board maintain its high standards over time and we believe the Advisory Board will help support that. The other two components are the development committee and populating the foundation. In addition, Julie Almond with the HealthFirst Family Care Center is a

great access for us to a number of organizations including translation services and family support services, which will help us connect to low income and ELL families.

- I also had the opportunity to sit down with Jack Sbrega, the president of Bristol Community College (BCC), and talk to him about, if we are approved, the work we could do with BCC. Not only did he agree and encourage collaboration on the education side, but also on the advisory council side and the board side. When I asked if he had any of his people at BCC that might be interested, he said yes.

5. Kristen Pavao: Describe how your professional experience and the Building Excellent Schools' fellowship have prepared you to be a charter school founder and leader. Tell us about your experiences since the BES Fellowship concluded.

- So while it has shifted, it has shifted in very supportive ways. BES has been absolutely deeply engaged in the work and so excited to help found a school in Fall River. On a regular basis, I communicate with Sue Walsh and Eileen Callahan to continue to monitor and develop our action plans. In thinking about opening in 2014, it is intensely important that we have a very comprehensive plan in place and we can continue to monitor readiness on all those pieces: student enrollment, facility, hiring, full year professional development, and ensuring that we jump out the gate as strong as possible. Eileen has experience with Boston Collegiate who also had a quick start, so I pull from that expertise as well. Eileen and I speak at least weekly to talk about action plans and how we are tracking every item and what supports and what connections can Eileen provide to help with the quick progress of all the items on our list. Hiring is going to be critical. I have a lot of experience with hiring through my different experiences in management, but to have Eileen's support and capacity to support those initiatives would be excellent.
- BES has already provided the board with strategic planning training and if we are authorized BES also offers training in leadership, governance, and culture. They'll also assist us with hiring, curriculum, further board training, a retreat, and anything else we need in that supportive role. In terms of specifics, I understand that it's 120-150 hours of support on a yearly basis. There will be phone calls, culture audits, site visits and things of that nature.

6. How does BES view its responsibility to the proposed school?

- Primarily it is a supportive role. I see my role as providing another set of eyes and ears to a really complex process and working as close to Kristen as possible. We share comprehensive knowledge of the landscape of all that needs to happen. We want to be as honest about the work in front of us as possible. It's our job to support the board, Kristen, the students, and making sure that we're all prepared.
- As a national organization we've seen that it is a lot easier to get a charter in other states. The win isn't to get the charter; the win is to run a successful school. To step away post charter authorization is really to do a disservice to the people we work with and work for. We're very fortunate to be so close to Fall River. It's just 55 minutes from Boston. Our

commitment is to the quality of the school. The charter allows the school to happen. The commitment is very high.

- I think the commitment was shown over the last 8 months. They stuck with us all the way.

7. Explain the rationale for the leadership structure at the proposed school and its implementation over time, including the dual middle school and high school Principals, Directors of Achievement, and Deans of Students. Clarify the division of duties and responsibilities amongst the Executive Director, Principals, and the Directors of Achievement.

- The idea is that in year 3 we hire a middle school principal and in year 4 we hire a high school principal. Thinking about how we want to develop our folks internally for a number of different reasons that benefit the organization. The Director of Achievement will develop that person's capacity and expertise over time to hopefully take on that high school principal role and hopefully hire from within—perhaps the math chair or ELA chair—to then take on the Director of Achievement role over time. Primarily it is my job to evaluate the teachers in year 1 and again that's a grooming position. There's a grooming relationship between myself and the Director of Achievement to grow into that principal role because of overtime the principals will be taking on more of the teacher evaluations. We don't plan on having the Director of Achievement instruct at all, but if we find that we need them to, we may have them instruct on a small scale.
- One of the things we talked about in terms of evaluations, where having the Executive Director, Director of Student Supports, and the Director of Achievement, looking at teacher evaluation through different lenses. The ultimate responsibility for the full evaluation rests with the Executive Director.

8. Describe the proposed Teaching Fellowship program and the partnership with UMass-Dartmouth.

- The teaching fellowship program with UMass Dartmouth is one of the strong commitments we have to this notion of building a K-20 fabric—instead of just: here's college, here's middle school, and high school. The fellowship is intended to provide our pre-service teachers with an opportunity to work at Argosy. They would be working in the schools approximately two days a week; so 13, 14, or 15 hours a week. They'll be doing things like supporting the students during the 90 minute support periods, helping at the Saturday academy, and down to bus duty and hall duty. They really get a chance to see what it's really like to work in a school. This benefits Argosy because we'll have engaged qualified people in the school, other than the teachers to help support the students. We envision that the fellows will be largely coming out of our Four Plus One programs. So, they'll probably be seniors and they'll already have had some of their education courses and they will be actively enrolled in other education courses. The way our Four Plus One program works, when they finish their undergraduate degree, they have five courses left, basically. So, their senior year they are taking two or three of their key courses and they've already had that introductory course; so, they can certainly

function as knowledgeable people. We will have a two level filtering process for them. They will apply through our licensure officer first and she will determine which students, both schedule wise and academic performance wise, are appropriate to be sent forward to the school for final hiring.

- The fellowship program is critical to Argosy Collegiate because it does again reinforce our college-bound mission. In addition to that, because it's a brand new program, it's important for us to take a year in planning the fellowship in cooperation with the University of Massachusetts to identify what those roles will look like, instructionally and operationally, how they will grow, and how we will evaluate them and how we will modify over time.
- In talking to superintendents and other charter school directors in our area, they commented that one of the things they find really valuable in their schools is to have UMass Dartmouth students come visit because our student population is still largely a regional population, they are also large in first-generation college students. So, for them to go into these schools and interact with the students and say "you can do it" and "this is what it looks like" while they are still college students also provides a bridge for the students because the college is coming to them in some ways.

Finances

1. How was your budget developed? What resources did you use to develop the budget? To what extent did the board or any members of the board review the budget prior to submission of the final application? How would receipt of Charter School Planning (CSP) grant funding impact the present budget?

- We actually had a conversation with the Peabody Foundation about the possibility of the CSP money coming in and coming in a planning year. They've committed to support Argosy over time. We've done some other work around development including some research around other grants that we'll apply to. We've talked about it as a board. Where are there particular line items in the budget that are particularly stressed? We talked about student enrollment, the 100 students, and what will their needs be. That's the very first place we're going to go. Specifically we think about what supports they are going to need academically, behaviorally, and counseling. The first place we've love to go is hire another special education teacher. We think that is critically important. Also, we'd look at the hiring process and think about how we can be a little more competitive to ensure we get the best educators possible, short term and long term.
- We've talked about technology, especially if it's a one-time grant as oppose to reoccurring; we would want to use it in the technology side.
- We've talked about building a contingency fund as well.
- BES has no role in making financial decisions, but I would strongly suggest to this board to be thinking about bringing on goals that you had for future years. If you are waiting for year 2 or year 3 to bring an operations person in, the CSP grant would allow you do that.
- The development coordinator is a role that we'd do in year 3. That is something, through our research locally with development coordinators, development researchers, and grant

writers strongly urge bringing on a development coordinator much earlier. We take that advice very seriously.

- We're not going to go out and spend that money the day after we get it. One of the things I've talked about with the finance committee and with Kristen is doing a risk assessment of the organization and perform a gap analysis, as well. I'm the chief risk officer for the bank and I spend a lot of time with the board there looking at the risks in the organization and how best to address that. I think one of the things I'm going to recommend to the finance committee and the full board is that we do a risk assessment and see how we can use additional funding to alleviate some of those risks.
- As the proposed treasurer, we had an initial draft of the budget that was presented to the finance committee by Kristen and Cynthia from Central Source and one of things we did, we had some basic assumptions in mind as we looked at the budget. The first thing was that we were very cognizant that we have public funds entrusted to us. It was important that we use those funds as best as possible to reach the mission of the school and making sure we maintain the viability of the organization, as well. We had some initial discussions. We talked a lot of staffing and the educational program. It was very helpful when the finance committee had a meeting with the full board. We had the long term people with the two bankers and we also had the long term educators and as you can imagine the culture is a little bit different; but both are critical to the success of the school. We really had some good and frank discussions about meeting the educational needs of the school and using public funds as judiciously as possible. We talked a lot of staffing, salaries and benefits. As a board we were able to build a conservative budget. The budget gives us some room because of the conservative nature; it gives us some flexibility as we deal with some of the issues of starting. We wanted to make sure when we made this that we had in place very good monitoring systems to support the budget going forward because more than likely the budget will need to be adjusted if we are authorized. We talked about the timing of everything and supplementing the budget with a line of credit, which I think will be critical for us because of the timing of revenues and expenses and so forth. We think we have a good plan in place.
- Assumptions are critical to any startup organization. We had two bankers that were involved in the budget initially. We had our banker's hats on and we were not going to be comfortable with the budget until we understood the assumptions; where they came from, did they make sense. Using Central Source as an entity helped us prepare that and get us the data; it provided us with the assumptions that we felt comfortable with. We dug a lot deeper this year preparing the budget before the board saw it. We didn't really have a finance committee in the past and we do this year. We were able to give a lot of scrutiny, ask a lot of questions, and have those questions answered before it actually got to the board level. So we added that extra layer, but we also added a couple of people who are conservative in their budgets, having dealt with this for many years.
- As the proposed school leader, quite honestly I would refer to myself as a pre-freshman last year in the process and it was a great wake-up call that there was much more work and much more research to be done on my part to expand my understanding. I knew I had to improve my analysis, so I communicated with a lot of business managers, CFOs, and DFOs from other charter schools and asked a lot of questions. I did a lot of research on

the Department's website. I've appreciated of the relationship I've built with Cindy over time. Before we drafted a budget we had many conversations around where the revenues came from, how were they formulated, how do you predict and what factors go into that, how flexible do you need to be, and how do you make adjustments over time? Because this is a draft; and we do know that we need to be flexible and at which spots we can be flexible. I've learned how complicated determining some of these figures is. Partnering with charter schools that are deeply involved in the work and partnering with Cynthia whose focus is budget and finance particular to Massachusetts charter schools, as well as building finance expertise on the board made it a much more collaborative process. I think budget and this process represents how we would determine and plan for future budgets.

- The first budget that we put together should be the least specific budget we'll ever have because we have all these unknowns; the facilities, the hiring and things like that. The budget is our financial plan based on all the evidence of all the study, all the work that has gone in over the last year since our first appearance before you folks.