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| **final application REVIEW 2016-2017** | |
| **Proposed School Name (Commonwealth):** | Equity Lab Charter School |
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| **Grades Served At Full Capacity:** | 5-12 |
| **Number of Students At Full Capacity:** | 640 |
| **Proposed School Location:** | Lynn |
| **Proposed Opening Year:** | 2018-2019 |
| **Mission Statement:**  Equity Lab Charter School partners with families and communities to provide powerful learning experiences that unleash students’ natural potential for creativity, innovation, collaboration and social responsibility. Through integrated and project-based curricula anchored in authentic experiences of social entrepreneurship, students develop the academic and social emotional competencies to complete higher education, thrive in evolving economies, and seize opportunities to be change agents in their communities. Serving as an incubator for educational and social innovation, Equity Lab works to scale equity in schools and communities.  **Proposed Growth Plan for First Five Years of Operation[[1]](#footnote-1):**   |  |  |  | | --- | --- | --- | | **School Year** | **Grade Levels** | **Total Student   Enrollment** | | First Year | 6-7 | 160 | | Second Year | 5, 7-8 | 240 | | Third Year | 5-6, 8-9 | 320 | | Fourth Year | 5-7, 9-10 | 400 | | Fifth Year | 5-8, 10-11 | 480 |   The Department has compiled a summary of the evidence identified through the review of the charter application, the responses provided by the applicant group during the subsequent interview, and the testimony and comment provided at the public hearing and during the public comment period. The summary below describes the evidence identified that addresses the application criteria and identifies the areas of the application criteria where limited evidence was provided during the application process.  **Public Comment:**  At the public hearing, 17 speakers spoke **in support** of the proposed school, including parents, community members, Lynn School Committee member Maria Carrasco, and three members of the applicant group. The application did not receive written comment in support during the public comment process.  The application received testimony and written comment **in opposition** during the public hearing and public comment process. At the public hearing, 11 speakers spoke in opposition to the proposed school, including: Lynn City Councilor-at-Large Brian LaPierre, Lynn School Committee members Lorraine Gately and Jared Nicholson, Lynn Public Schools Superintendent Catherine Latham, teachers, parents, and community members. Written comment in opposition includes two written statements shared at the public hearing and four letters received by the Department, including one signed by members of the Lynn state legislation: State Senator Thomas M. McGee and State Representatives Lori A. Ehrlich, Donald H. Wong, Brendan P. Crighton, and Daniel F. Cahill. | |

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| **Mission (I.A.) and Key Design Elements (I.B.)**   |  |  | | --- | --- | | **Identified Evidence** | **Limited Evidence** | | * The mission communicates values of high academic expectations and community engagement. (I.A.) * The mission is generally reflected throughout all sections of the application. (I.A.) * The application briefly describes the applicant group’s educational philosophy aligned with the mission. The school seeks to achieve equity through helping each individual realize their potential. The school proposes to help individuals realize their potential by providing access to a relevant and challenging curriculum in an inclusive and collaborative educational setting. The application briefly describes four core values which are also listed in the mission: creativity, innovation, collaboration, and social responsibility. (I.B.) * The application clearly identifies five key design elements: project-based learning, community-based learning, inclusive learning, social emotional learning, and creative learning. These are generally aligned with the mission, even if they are not specifically referenced in the mission. (I.B.) * The application describes an image of the school’s future in which all members of a diverse student population thrive in a rigorous academic program with ties to the Lynn community. (I.B.) | * The stated outcomes of an education at the proposed school: "to complete higher education, thrive in evolving economies, and seize opportunities to be change agents in their communities" are aspirational and vague. It isn't clear how the school would assess students' progress toward these outcomes. (I.A.) * Although the mission references key terms related to the five key design elements, it does not clearly incorporate the key design elements proposed to achieve outcomes. (I.A.) * The descriptions of project-based learning and community-based learning in the key design elements section are not consistent with descriptions in the curriculum section of how project-based learning and community-based learning will be implemented. (I.B.) * The application lists key academic and nonacademic goals for students that are consistent with the stated mission, key design elements, and educational philosophy of the school; however, the goals lack specificity, and it is unclear how progress towards meeting the goals will be tracked. The application lists a variety of student assessment measures the school intends to use, but does not explain how any one of them will be used to measure progress towards a specific goal or goals. The Logic Model (Attachment 11) does not help clarify the relationship between design elements, goals, and assessment of success. (I.B.) | |

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| **Description of the Community to Be Served and Enrollment and Recruitment (I.C. and I.D.)**   |  |  | | --- | --- | | **Identified Evidence** | **Limited Evidence** | | * The application describes the student population that the proposed charter school would serve, based on characteristics of families who attended 28 information sessions held by the founding group since 2012. The application states that about two-thirds of families were Latino and about a third were Cambodian. The applicant group anticipates that the school would serve English learners (ELs) and students with disabilities in numbers comparable to those served by the Lynn district. The applicant group anticipates that more than half of students will be the first generation in their family to attend college. (I.C.) * The application states that the proposed school received over 300 requests for student application forms following the May 2016 news that the applicant group was invited to the final round of the XQ Super School Project, a national school-design competition. During the interview, the proposed school leader indicated that the applicant group has received 170 completed application forms. (I.C.) * The application states that the founding group has been working since 2012 to identify priorities of Lynn parents, and that it has connected with over 900 families at 28 information sessions. The application includes a chart that lists priorities identified by families at sessions and shows how elements of the school’s mission and key design elements are aligned with those parental priorities. (I.C.) * The application lists two community partners with whom the applicant group has been working to identify prospective students, and lists four additional organizations with whom the applicant group hopes to partner in its recruitment efforts. During the interview, the Big Picture Learning (BPL) representative stated that BPL’s chief communications officer will work with the proposed school on marketing strategy and marketing materials. (I.C.) * Consistent with the school’s emphasis on community engagement, the school plans to provide families and community partners with multiple opportunities to support the success of the school. In addition to more traditional means of involving parents, parents and community partners will also have opportunities to be involved in tutoring and mentoring students. The school plans to recruit community partners to provide internships to students. (I.C.) * The application articulates an intent to establish a “Lynn compact” organization like those in Boston and Lawrence as a way to collaborate with other public and private schools in Lynn. (I.C.) * The school plans to maintain the cohort of 80 at each grade level by backfilling all grades. (I.D.) | * While the application includes details about the student population the school anticipates serving, it does not describe the specific needs of that population. (I.C.) * The application suggests that the school will play a vital and ongoing role in addressing a range of issues in the Lynn community, but it is unclear whether the applicant group possesses the capacity to successfully implement such an effort. Two of eleven proposed board members (the proposed school leader and one other board member) live in Lynn, and while the applicant group has been active in the community since 2012, just two community organizations have signed on as partners. During the interview, members of the applicant group expressed confidence in their ability to develop additional community partnerships during the pre-operational period, specifically citing the support of the North Shore Labor Council and the Massachusetts Business Alliance for Education. (I.C.) * The school’s plan for collaboration with Lynn Public Schools does not specifically address how the founders will overcome the local school community’s opposition to the proposed school. (I.C.) * Reviewers noted concerns regarding the proposed school’s plan to roll out grades and enrollment during the first charter term. The application indicates that the school will enroll 160 students in grades six and seven in year one, and will add a successive grade cohort of 80 students each year until total enrollment of 640 is reached in Year 7. The application includes an enrollment plan to open with grades six and seven, add grades five and eight the following year but subtract grade six, add grade nine the following year and subtract grade seven, and so forth. During the interview, applicant group members indicated that the reason for delaying the opening of grade five is because of limited demand. They indicated the intent to change the proposed growth plan by serving an additional grade level and its associated enrollment in year two. In year two the school would double in size, enrolling 320 students in grades 5-8. One additional grade would be added in each of the following years, with the school completing its growth plan in year six instead of year seven. (I.D.) * The application does not include a draft application for admission as an attachment. (I.D.) | |

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| **Overview of Program Delivery and Curriculum and Instruction (II.A. and II.B.)**   |  |  | | --- | --- | | **Identified Evidence** | **Limited Evidence** | | * The application includes research citations supporting the use of teaching practices associated with each of the five key design elements: project-based learning, community-based learning, inclusive learning, social-emotional learning, and creative learning. (II.A.) * The application states that school will be in session 185 days, with a mandatory daily schedule that starts at 8:30 a.m. and ends at 5:30 p.m. (II.A.) * The application provides a sample weekly schedule for grades 5-8 and for grades 9-12 and an adequate description. For students at all levels, the day is organized into a 30-minute morning circle time, six 75-minute blocks, and a 60-minute lunch. Students in grades 9-12 spend one day a week in internships. (II.A.) * The school plans to use a project-based learning approach that integrates learning across content areas, with a social entrepreneurship focus. Students will be organized in class sizes of 20 students. Students will stay in the same room throughout the day and staff members will travel. (II.B.) * The application lists and describes instructional practices aligned with the mission, including community and project-based learning. (II.B.) * The application states that the school will provide targeted academic and social emotional interventions at the whole-group, small group, and individual levels. The applicant group describes this approach as Resiliency Program Management (RPM). (II.B.) * Teachers and support staff have one period (75 minutes) a day for planning, collaboration, and/or PD. (II.B.) * Professional development is to be informed by analysis of student data, aligned with annual instructional priorities, and provided through BPL and school based coaching during the school year and during two intensive summer trainings. (II.B.) * The principal will implement the teacher evaluation system, which includes four formal observations a year. The chief executive officer (CEO) will perform evaluations of faculty until the principal is hired after year one. (II.B.) | * The application includes limited evidence of a plan to develop and implement the community-based learning elements central to the program: community exploration, tutoring and mentoring program, internships, and dual enrollment college program. (II.A.) * The application frequently states that the proposed program will address the needs of “diverse learners” as a whole, rather than indicating how it will meet the needs of specific subgroups. (II.A.) * The application provides limited evidence of a plan to implement the practices associated with inclusive learning described in the application, including reading and writing workshop, and practices associated with Universal Design for Learning. To be implemented with fidelity, each of these instructional approaches requires a significant commitment of time and resources for training teachers and providing ongoing coaching support. (II.A.) * The application lacks clarity with regard to the implementation of Accelerated Learning Labs, a central component of the school’s plan for addressing the needs of diverse learners. (II.A.) * The application states that for both the middle school grades (5-8) and high school grades (9-12), student cohort groups and their teachers will advance together for four years, without providing evidence for the feasibility of such a plan. During the interview, members of the applicant group emphasized the value of this looping arrangement in building strong relationships. Members of the applicant group acknowledged the challenge of requiring teachers to have content area expertise across a four year grade span and said they intend to provide professional development and partner with community members for expertise. (II.A., II.B.) * The application includes a scope and sequence chart for grades 5-12 but does not explain, given the proposed model for developing the curriculum on an annual basis, how the school will ensure that the standards are being met for each grade level each year. (II.B.) * The application states that the curriculum “emphasizes the main features of MCF (Massachusetts Curriculum Frameworks)”, but does not describe a process used to align the curriculum to the MCF, nor does it identify the individual(s) who will be responsible for curriculum alignment to the MCF. (II.B.) * The application states that the curriculum will be developed by the proposed CEO during the pre-operational period, with the support of Big Picture Learning. The application does not include evidence of the proposed CEO’s capacity to develop curriculum or a description of the curriculum-development support to be provided by BPL. During the interview, the proposed CEO stated that an Education Development Center (EDC) consultant created the sample included in the application and that the same consultant will continue to assist with curriculum development. During the planning period, the proposed CEO will visit other BPL schools to review their curriculum and determine what curriculum can be borrowed and adapted and what curriculum will need to be developed. (II.B.) * The application does not clearly describe how the process of developing new curriculum each year will be possible or sustainable. (II.B.) * The application does not clearly indicate the extent to which teachers will supplement project modules with additional curriculum and instruction to address content knowledge and skills aligned with state standards. (II.B.) * The application indicates that the CEO and the middle and high school principals are responsible for oversight of the process of reviewing the curriculum, but does not describe the process and procedures that will be used to evaluate whether the curriculum is effective and successfully implemented. (II.B.) * The application includes limited evidence that teachers will be adequately supported to effectively implement the model described in the application. The application states that teachers whose performance is weak will receive quarterly check-ins. During the interview, the proposed CEO, who will also initially serve as school principal, stated that he views his role as being responsible for how staff members support one another. (II.B.) | |

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| **Student Performance, Assessment, and Program Evaluation (II.C.)**   |  |  | | --- | --- | | **Identified Evidence** | **Limited Evidence** | | * Student progress will be monitored through assessment of project portfolios, Achievement Network (ANet) English language arts and mathematics assessments, state tests, and Program in Education, Afterschool, and Resiliency (PEAR) assessments. The school plans to partner with ANet, BPL, and PEAR in developing its assessment system. (II.C.) * The school intends to assess the success of the school using a number of long-term measures such as college enrollment and completion rates and measures of civic engagement and economic success such as employment. (II.C.) * The school’s approach to homework for the middle school grades is primarily about engaging families in students’ learning. At the high school level, the approach is to develop students’ abilities to work independently at the sorts of tasks they will need to complete on their own in college. (II.C.) * The application briefly summarizes the specific contexts (board meetings, family conferences, public panels, morning meeting) in which all stakeholder groups will both receive information about student performance and have opportunities to respond. (II.C.) * The application briefly describes how the school leader will work with the board and with input from other stakeholder groups to develop an accountability plan during the first year of the school’s operation. (II.C.) | * The application includes grade-level promotion standards and graduation standards. These are aligned with assessment of student competencies in creativity, innovation, collaboration, and social responsibility, which are the school’s four core educational values. However, the connection between an individual competency and the category into which it is put is not always clear. For example, the application states “Gather relevant information from a variety of sources, assess the credibility” as a measure of creativity. (II.C.) * Alignment between grade-level competencies and state standards is unclear. (II.C.) * Alignment between the list of academic and social competencies and the plan to use ANet, BPL, and PEAR in the development of assessments is unclear. (II.C.) * The application does not describe how students would be evaluated for their internships or college classes, or what the promotion standards are with regard to those requirements. (II.C.) * It is unclear how the continuous improvement plan described in the application will comprehensively incorporate analysis of all of the various measures, how all stakeholders will be involved, and how actions will be generated and monitored for effectiveness. (II.C.) * The application contains a draft accountability plan with objectives and measures related to the school’s mission and key design elements; however, many of the objectives and measures lack sufficient specificity to make them meaningful. (II.C.) | |

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| **Supports for Diverse Learners (II.D.)**   |  |  | | --- | --- | | **Identified Evidence** | **Limited Evidence** | | * The application lists strategies associated with Sheltered Content Instruction: designing and working toward content and language objectives, building background knowledge, building comprehension, and so forth. (II.D.) * The application states that students will be identified and assessed by the equity director and EL specialists (two per grade level), using the Home Language Survey and the WIDA ACCESS placement test. (II.D.) * Services for ELs will be delivered in general education settings and/or during Accelerated Learning Lab periods, where they will receive direct English instruction. (II.D.) * The application includes a description of support services to be offered for students with disabilities. Universal Design for Learning is described as informing the school’s approach. The school will offer instruction in inclusive settings, with classes co-taught by special education teachers. (II.D.) * Student identification and assessment will be conducted by the equity director and special education teachers (one per grade level) based on input from a Learning Intervention Study Team. (II.D.) * Individualized learning plans will be developed by the equity director and learning specialists in cooperation with the student, the student’s family, and the student’s advisor. (II.D.) | * The application does not describe an English as a Second Language (ESL) curriculum. (II.D.) * The application does not provide sufficient clarity regarding the referral process for students who may have a disability. (II.D.) * The application states that “all teaching staff will be responsible for attaining their Sheltered English Immersion (SEI) endorsement” but does not include a plan to support teachers in obtaining the endorsement. (II.D.) * While the application describes sheltered content instruction and inclusion in general terms, the application does not provide sufficient detail to demonstrate sufficient knowledge of the implementation of both approaches within the proposed model. (II.D.) * Since each grade cohort will be divided into four sections, it is unclear how the two EL specialists and one learning specialist for each grade level will divide their time and deliver instruction in the co-teaching model described in the application. (II.D.) * The application includes a general statement that the programs to serve ELs and students with disabilities will be assessed based on student performance data collected by the school. The criteria and process for evaluating the program are unspecified. (II.D.) | |

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| **Culture and Family Engagement (II.E.)**   |  |  | | --- | --- | | **Identified Evidence** | **Limited Evidence** | | * The application describes how the school will build a school culture consistent with the school’s mission. Elements are drawn from Big Picture Learning: democratic governance, focus on relationships and communication, proactive behavior system, social entrepreneurial mindset, and relentless reflection and excellence. (II.E.) * The application describes plans to address students’ physical, social, emotional, and health needs by providing daily physical exercise, access to counseling services, access to a school nurse, and healthy snacks and meals for all students. (II.E.) * The application describes a restorative justice approach to student discipline, including restorative circles and mediation. (II.E.) * The school plans to involve parents in a variety of ways as partners in the education of their children, including having the each child’s advisor serve as a primary point of contact with parents, providing opportunities for parents to serve as tutors and/or mentors, involving parents in regular conferences regarding student progress, and involving parents in school oversight through the school leadership team (SLT). The SLT is a stakeholder group team which meets monthly to review and discuss school performance. (II.E.) | * The application does not develop the rationale for the proposed one-hour lunch. (II.E.) * The application includes a plan for a family and community education program to be staffed with a still unidentified community agency. (II.E.) * The applicant group has identified nine potential partners, specifying that seven of the organizations “have not committed to collaborating with our school”. The application includes letters of support from two community organizations. (II.E.) | |

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| **Capacity and Governance (III.A. and III.B.)**   |  |  | | --- | --- | | **Identified Evidence** | **Limited Evidence** | | * The application summarizes the experience and qualifications of each proposed board member and of the proposed chief executive officer (CEO), Frank DeVito. Of the 12, 7 have governance experience, 6 have finance experience, 6 have management experience, 8 have fundraising experience, and 7 have community service experience. One has significant K-12 experience, 2 have English learner expertise, 1 has special education expertise, and 1 has law experience. Two currently live in Lynn. (III.A.) * The applicant group includes a proposed school leader, Frank DeVito, who first started working on the project in 2012 and was appointed CEO by the 2012 applicant group based on his professional experience as a teacher and school leader. Frank has over 20 years of experience in the field of education, with eight of those years as a teacher and headmaster in Chelsea Public Schools (1991-1999). (III.A.) * The application explains that that board is responsible for hiring the CEO, who will report to the board. (III.B.) * The application describes the representation of stakeholder groups on the board of trustees. The proposed board of trustees would include the CEO, a parent, a teacher, a student, and a community partner as voting members. According to the draft bylaws, the board shall consist of 7-25 individuals. (III.B.) * The proposed board of trustees would consist of six officers, including board chair, associate chair, treasurer, associate treasurer, secretary, and associate secretary. The application and draft bylaws both include a brief job description of each position. The application also states that the board will have five committees to support effective oversight: education, development, finance, governance, and strategy. (III.B.) * The application describes processes related to the board’s oversight of the school, including setting priorities and goals; monitoring progress towards priorities and goals; supporting, monitoring, and evaluating the school leader; developing the annual budget; monitoring the school’s finances; and conducting long-term financial and strategic planning. (III.B.) * The application describes proposed systems that will be put in place to ensure clear decision-making and communication. (III.B.) * The application and draft bylaws describe the processes and procedures for handling complaints made to the board. (III.B.) * The application describes a proposed board self-evaluation process to be conducted twice each year. (III.B.) * The application describes how the board will develop policies and make decisions in a way that ensures that all stakeholders’ views are taken into account. (III.B.) * The application describes how the governance committee of the board will recruit and select board members based on a set of criteria that takes into account diversity and expertise, and assumes commitment to the school’s mission. (III.B.) * The application and the draft bylaws outline succession planning for the school leader and for board members. (III.B.) * The school intends to partner with Big Picture Learning (BPL). The application states that BPL was chosen because of its “rich history of developing and sustaining innovative, rigorous, and high performing schools,” and because it is a “leading pioneer of real-world learning, personalized learning, and project-based learning, and its educational model has a track record of dramatically raising the achievement levels of diverse youths in under-resourced communities.” These characteristics are relevant to the proposed school’s mission and key design elements. BPL will provide assistance in the areas of program and curriculum design; parent, business, and community engagement programs; staff selection; principal training/coaching; and staff training/coaching. (III.B.) * The application indicates that the school will have programmatic relationships with the following organizations in addition to BPL: The Achievement Network (ANet) (academic assessments), Program in Education, Afterschool, and Resiliency (PEAR) (holistic student assessments), Central Source (finance and technology), and HR Knowledge (human resources), and includes a letter of commitment from each. (III.B.) | * The application states that the proposed CEO “recruited individuals who were invested in Lynn and were involved in innovative professional projects that spanned education, art, technology, science, health/human services, media/communications, and business/finance.” While the members of the proposed board indeed appear to be involved in projects in the range of areas indicated and three members have ties to the Lynn community, the board’s ability to leverage the professional and personal connections of its members to develop partnerships in support of the school’s program is unclear without evidence of commitments from community organizations. (III.A.) * The application includes general descriptions of the role of the board, the roles of the officers, and the role of the four committees, but includes few specifics about systems for ensuring oversight and clear decision-making. (III.B.) * The application states that BPL will provide contracted support services, described in an attached contract. The contract appears to have some internal inconsistencies. For example, although curriculum development and staff selection are key elements of the general plan, neither is mentioned in the specific plans for the planning year or subsequent years. (III.B.) * The application includes a limited discussion of what would need to be included in an effective board member training and orientation process. (III.B.) * The application does not describe how the school and/or the board will monitor the performance of the entities delivering services to the school under proposed contracts. (III.B.) | |

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| **Management (III.C.)**   |  |  | | --- | --- | | **Identified Evidence** | **Limited Evidence** | | * The application includes an organizational chart for year one and at full enrollment that encompasses employees of the school and the board of trustees. The CEO reports to the board, and in year one oversees a finance and operations director, an equity director, and most other school staff. At full capacity, the CEO oversees a higher education director, a communications and development director, a finance and operations director, and high school and middle school principals, and multiple equity directors. The principals oversee school staff once they are hired. The application includes a narrative that explains the reporting structures. During the interview, members of the applicant group clarified that the equity directors will continue reporting to the CEO once the principals are hired. (III.C.) * The application describes the role and primary responsibilities of the school leader, the other members of the executive leadership team, student support directors, and community learning directors. (III.C.) * The applicant group includes a proposed school leader, and the application describes the selected individual’s professional background and the process used to determine that the individual is the best person. (Frank DeVito initiated the idea for the school and was appointed CEO in 2012.) (III.C.) * The application briefly describes the process to be used to evaluate the principals. (III.C.) * The application describes the plan for staff recruitment, advancement, and retention. The school plans to use an apprentice teacher program to recruit and train teachers, especially teachers from the Lynn community. The school anticipates that future principals and other school leaders will come from the teaching staff. During the interview, members of the applicant group stated that the BPL network and local colleges of education will serve as potential sources of teachers. (III.C.) * The application describes the qualifications and attributes of ideal teaching candidates. These include: reflecting the diversity of the student population, experience in project-based learning, strong content knowledge, passion for urban education and social justice, and commitment to collaboration. (III.C.) | * The application includes limited evidence for how the proposed CEO’s professional background supports his capacity to be successful in founding a high quality charter school with the proposed educational program. During the interview, the BPL representative described that organization’s role in supporting the proposed CEO by developing a personalized learning plan and a plan for reporting on his performance to the board. (III.C.) * According to the rationale for the management structure, principals, not the CEO, will focus on the school’s academic priorities. Given the complexity of the proposed curricular model, the fact that the application does not include a proposed principal or curriculum director signifies limited evidence of capacity. (III.C.) * While the description of the management structure indicates that the CEO is responsible for fiscal and operational oversight and principals and faculty are responsible for academics, the principals will be not hired until after the first year of operation. Given the complexity of the proposed curricular model, it remains unclear if the proposed CEO will be able to adequately address the variety of demands that will be placed upon him during the planning period and first year of operation, even with BPL’s support. (III.C.) * The application includes a limited description of the desired skills and experience of the principals for the middle school and high school grades. The positions will be added in years two and three respectively. (III.C.) * The application indicates that the board will “establish clear criteria and protocols for the hiring and annual evaluation of the CEO” (p. 86), but does not indicate what those criteria or protocols are. (III.C.) * The application indicates that the strategy committee of the board and BPL will both have roles in staff recruitment, but does not clearly define those roles. (III.C.) * The role of apprentice teachers is not clearly defined. In addition, apprentice teachers do not appear to be included in the staffing chart or in the budget. (III.C.) * The application does not explain how individual base salaries and increases will be determined or how the school will attract and retain highly qualified staff. It remains unclear how the proposed school will support the sustainability of the proposed work day for instructional staff. (III.C.) | |

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| **Facilities, Student Transportation and Finances (III.D. and III.E.)**   |  |  | | --- | --- | | **Identified Evidence** | **Limited Evidence** | | * During the interview, a member of the applicant group stated that the group is considering a number of properties, including one close to the city center, at 38 Exchange Street, Lynn. The group plans to use the pre-operational period to identify a suitable space, and anticipates raising additional facilities funds. * The school plans to use the Lynn Public Schools transportation system. (III.D.) * The application states that the CEO, the finance and operations director, and the finance committee of the board will oversee the school’s finances, with the finance and operations director exercising day to day oversight of the school’s finances. During the interview, members of the applicant group stated that they reviewed the budget on a monthly basis to ensure alignment with the proposed program as program details were revised. (III.E.) * The board’s finance committee will review monthly financial reports prepared by the finance and operations director and will report at each meeting of the full board. (III.E.) * The application states that the budget was developed in consultation with Central Source, a company that specializes in charter school finance. (III.E.) | * The proposed five year budget does not accurately reflect anticipated expenditures. The application’s budget assumptions related to the number of staff employed by the school annually, including administrators, faculty, and non-instructional staff, are inconsistent with staffing plans in other areas of the application. The draft budget does not reflect the applicant group’s intent to add an additional grade in year two as reported during the interview. It is unclear if the proposed revenue is adequate to support the programming and staffing as proposed. (II.D.) * The budget contained insufficient detail to explain budget assumptions which prevented the Department from determining the financial viability of the proposed school. The application indicates that the applicant group intends to pursue a line of credit prior to opening but did not describe any contingency planning to support the program if revenue and expenditures differ from projections. (II.D.) | |

1. The growth plan submitted within the final application reflected a revised version of the plan submitted at the prospectus stage. During the interview, the applicant group indicated the intent to change the proposed growth plan by serving an additional grade level and its associated enrollment in year 2. [↑](#footnote-ref-1)