

Argosy Collegiate Charter School

Questions as derived from panel and documentation review

1. How have your personal and professional experiences led you each to propose a charter school in Fall River? Tell us the history of the proposal and your involvement.

- Julie Almond, Founding Board Member - CEO of HelpFirst Family Care center. I've been the CEO for four years and was the CFO prior. One thing we do is knock down barriers that prevent people from accessing quality medical care. I want to insure that children can access quality education despite life circumstances. I'm very interested in knocking down barriers to quality education.
- Michael Grimo, Founding Board Member – I own a computer company in the Fall River area. I was IT director for the city of Fall River. In that position I was responsible for being on several committees. I was on board for when the school system had to come up with a five-year technology plan. I'm happy to be here as well.
- Teri Theberge, Founding Board Member – I've been a resident of Fall River for almost 30 years. I raised my four children in Fall River, my two oldest children attended district public school, and my two youngest children attended public charter schools. I have a wide range of ideas that I bring to the board. I work for the South Coast Hospital Group as a nuclear medicine technologist and I've been with them for 12 years, so I'm very involved in the community. I'm very interested in seeing Fall River extend their educational choices.
- Paul Burke, Founding Board Member - My journey started in my first year of high school when my guidance counselor said that I wasn't smart enough to go to college. I disagreed with him and ended up going to BCC and I graduated from Umass Dartmouth with a degree in Finance. I started my own insurance business. I was appointed to the finance board in the town of Swansea. I was a member of the board of selectman and I've been the town moderator for 18 years. I have almost 40 years of municipal experience. I'm certified in risk management and a certified insurance advisor. I've sat on education committee on a several boards. I've help set up a lot of scholarship opportunities. I'm very passionate about education. Very honored to help solve issues for children in Fall River and I think this board is more than capable of doing it.
- Susan Walsh, Chief Academic Officer for Building Excellent Schools, Proven Provider – I'm from Building Excellent Schools. I'm the Chief Academic Officer with BES. I've been with organization since 2004. I'm the primary trainer of the fellowship and have worked with people like Kristin Pavao and continue to support and grow quality charter schools. I work closely with Excel Academy and Boston Prep. I used to be principal at Boston Collegiate. I was a founding teacher

of one of the first charter schools in the state. I am passionate about building quality charter schools, not just another school.

- Kristen Pavao, Lead Founder - I am the lead founder of Argosy Collegiate Charter School and I am also fortunate enough to be a fellow at Building Excellence schools. I'm very excited about having important work to do. I have a background in education, and have been very focused on leadership and school leadership. I was born and raised in Fall River and raised my family here. Passionate about the history of Fall River and excited about future of Fall River and providing choice for students. All children in Fall River deserve quality college preparatory education. There is a three tier ripple effect of providing quality education and those are positively impacting families, parents, and the future children of that child.
- Lisa Rocha, Founding Board Member – Worked as attorney in Fall River for five years. I grew up in New Bedford. I have expertise in reviewing contracts, financial statements and can provide council, but more importantly, I joined this board because education is very important to me. I was the first in my family to go to college. I can't think of a better way to give back to the community than to bring quality education and choice to Fall River.
- Nick DiNardo, Founding Board Member – Worked in higher education publishing and technology for over 6 years. As part of work, I've travelled across country, visiting colleges, talking to executives about wants, needs, and what the future should hold. What I've heard from them over those 6 years has been that there is growth in the socioeconomic gap. It's my responsibility to help these students in Fall River close that gap. Humbled to be part of this fantastic team.
- Michelle Pelletier, Founding Board Member – I am a commercial owner, broker and manager of commercial real estate in Fall River. I've lived in the surrounding communities my entire life. I have built and grown my real estate business for 15 years. I've been on many business boards including chairing the local chamber of commerce. Most importantly, I have two small children, ages 13 and 11, and I tell them every day that we are blessed and that it is our obligation to give back to our community. This is our opportunity to give back to Fall River.
- Israel Navarro, Founding Board Member – I immigrated to this country for the opportunity to seek education. It's personal for me to be on other side, so I can help in any way students of the same stature. Our community has a large immigrant population and they deserve a great educational opportunity. I am a registered nurse by trade. I have mostly worked with children and adolescents. I am particularly good with childhood development and understanding kids' needs. It's a pleasure to be here.
- Misha Charles, Director of Governance and Board Development at Building Excellent Schools – I am the Director of Governance and Board Development at

Building Excellent Schools. I've worked with over a dozen charter school boards across the country as well as here in Massachusetts helping them to recruit the right kind of people for their boards, training them in the area of governance and preparing them to be really good stewards of the public trust. I am very excited to have this conversation today.

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

2. What are the challenges that Fall River students face that your proposed school will address? How does the proposed school address these challenges for students and their families?

- A challenge we looked at included demographics; looking at specific neighborhoods and communities in the city and looking at how children are doing academically. There are very low college attendance and graduation rates in Fall River, particularly in the Flint area of the city. Another challenge is to cultivate ambition in children and in students. We want to break down restrictions that children may feel because perhaps their parents were not college bound or didn't go to college. There is a large Portuguese population in Fall River. The Portuguese community is very much invested in a good work ethic; children get to work as early as possible, which may lead to foregoing education. It has to do with poverty in our city. It's a struggle to change the mindset of an adult culture that children can still be successful and even more successful with quality education. We're having lots of conversations with families and children with regard to goals, dreams, decisions, higher education, joining the workforce, and choosing relevant programs that are relevant in the work place. We need to plant the seed in children that education is important and can lead to a great life.

3. What progress have you made since submitting your final application to engage families and the community in your vision?

- Our kickoff campaign started with our Boots on the Ground where we went to one of the largest Fall River public housing and we visited each and every family there and talked about the schools and passed out info with parents. We had a lot of positive feedback. We also went to Boys and Girls club and had a few events there and talked to children and families. We went to two local supermarkets and talked to families going in and out of the market. We also plan to host orientations.
- I'd like to add that through the effort, we've gathered over 600 supportive signatures.
- We learned so much talking to families. We discussed concerns and we explained the importance of school culture. The signatures of support have been an incredible resource in terms of communicating with families. We used that list for making phone calls to parents, questions, and refreshing memories regarding

Argosy. We used contacts to encourage families to come to public hearings. Those contacts were also used to develop a list for our newsletter, which starts this month. The newsletter will include what the board is doing, our plans, what the board is doing, our focus and outreach.

- It was very inspiring to do community outreach. Families were so excited about another choice for their children. Even people without children were excited about it because they had friends with children that could really benefit from the school.
- We've reached out with Health First located in Flint Village for them to help us support people receiving healthcare. Also True Med, which is another healthcare facility located in South End. Those two have been very interested and helpful in reaching out to the community.
- There's also the housing authority and Boys and Girls Club who have both shown a lot of support.
- We are also building a relationship with the executive director of the Flint Association. It's an organization in charge of over 150 local businesses in the Flint Village. Flint spoke in support of us at the public hearing. We're also trying to partner with a company called 'Smiles' that does a lot of work with juveniles in the city and we're trying to work with them with a focus on how education can change the trajectory of young people's lives. This helped with language barriers and to get the word out there that Argosy Collegiate is about providing a quality educational opportunity.
- We've talked with several neighborhood associations. Developing relationships with these is a key to our success because not every neighborhood has the same needs and challenges.
- Also reached out to Mayor's office and had discussions with coordinator, Perry Long, who is in charge of neighborhood association. He'll be a great support for us. Another group that was very helpful for us was the Mill Owners Association. They are willing to help us find property in the city.
- We're working with business groups in community as well, to assist with process.

4. Elaborate upon the anticipated outcomes stated in the mission for graduates of the proposed school. How are aspects of the mission reflected in concrete terms throughout the application and measured over time?

- Getting children to and through college is the drive behind our program and work. Our goal is to get 100% of children academically prepared. We built our program similar to Boston Collegiate. We've talked to their college counselors and looked at their program every year and a lot of our program builds upon their program in that through gradual release kids become more and more independent. We're

focused on vocabulary which has a strong effect on standardized testing. We want to support families and children in getting to college; finding the right school, exploring financial options, grants and scholarship money, and Massachusetts grant money. Boston Collegiate pledged to visit every graduate on campus to see how they are doing; we think this is a great idea. Getting the students to college and then saying “we’re done” isn’t thorough enough.

- In our area, in Fall River 61% of student population is sub-proficient in English and 65% sub-proficient in math, and we want to change that, so we want to focus on reading and math skills.
- We want to be sure children are aware of what is available to them. The goal is to have the children visit at least 75 colleges in the surrounding area from their freshman to their senior year. We want them to know what is out there.

Educational Philosophy, Curriculum and Instruction, and Assessment

1. Explain the selection of DREAM values (Determination, Responsibility, Excellence, Ambition, and Mastery).

- Our dream values are Determination, Responsibility, Excellence, Ambition, and Mastery. We want our kids to realize that with determination, they can succeed academically and socially. We want our kids to learn responsibility from a very young age. With excellence, we want our children to excel at everything they do and we want to reward them for realizing that there are rewards for achieving excellence. We also want our children to be ambitious. We want them to set goals and strive to achieve them. And of course, Mastery. If all of our children can master these values, I think it’s important that they leave with a good ethical background.
- Initially the goal is to give students 100 DREAM points every Monday as they go through the week based on their experiences and decision making, they gain or lose points. A report will be made and sent to parents to keep them updated regarding their children.
- We’ll communicate to students what expectations are. We’ll communicate our expectations to staff and administration as well. We communicate positively and constructively when students are exhibiting the dream values.
- On Fridays we’ll have early release day and students will be recognized for DREAM values.

2. Kristen Pavao: Describe the process used to develop the proposed curriculum.

- Through the fellowship we had the opportunity to develop a very collaborative relationship with some of best curriculum developers in country. We are just

scratching surface in curriculum development for Argosy Collegiate. On Monday, I'll be beginning a very intensive residency with Dana Lehman, one of the best curriculum developers in the country, and I'll really focus on becoming expert at developing curriculum, developing rigorous lesson plans, providing daily feedback to teachers to help develop their lesson planning. We'll have daily feedback to teachers to develop lesson planning, their data analysis, response to intervention and creating a rigorous curriculum. When I think about Common Core, we know where the bar has been set. We'll take the framework of core curriculum and try to raise the bar. We're looking at best curriculum that is out there, and working with curriculum developers. Once we have a good one to work with, then we'll be reflective and continuously get better.

3. One of your core beliefs is data driven instruction. Please describe your approach to ongoing improvement and refinement of the curriculum and educational program with the use of student data from assessments.

- Using data is implemented and it is right in our schedule. We have a lot of professional development. We have Scantron show-what-you-know quizzes every Friday that are graded that day that teachers can use in professional development that afternoon so teachers can schedule tutoring, Saturday Academy or work on refining lessons plans for following week. Life is data driven; everyone has to take tests. We'll use internal tests made by teachers, and external tests like the MCAS and the achievement network will be utilized as well.
- When scholars come into the school, scholars will take a Stanford 10 assessment which is nationally normed and that serves as the baseline to say, this student need remediation and they'll have to go to Saturday academy, which is every Saturday from 7:30-11:30am during September, then two Saturdays every month thereafter. From there you have the Achievement Network results which finish with 12 data days so teachers can implement what they are finding from those Achievement Network results. Data is extremely important to get and put into action as soon as possible.
- In terms of developing the curriculum, one the experiences through the fellowship even with weekend warrior programs through BES, there is tremendous support around curriculum development. What's very motivating is that school leaders of outstanding charter schools are constantly looking to improve curriculum. When you have the best you can improve. Working with more and more people to develop curriculum is something I very much look forward to.
- We'll receive board dashboards, financial and curriculum related, which we can then make recommendations off of.

4. Kristen Pavao: Tell us more about the pedagogy teachers will use at the proposed school. Describe what teaching methods and strategies will be used for supporting a wide variety of students needs.

- Our data analysis is primarily focused on creating the interventions and the supports necessary. Once we have children's skill levels identified with relation to standards, we can then form small groups for tutoring, and for one-on-ones. Our Saturday Academy will be used immediately; it is front loaded at the beginning of the year. If our incoming students don't meet certain benchmarks, we'll know quickly and they'll be put in Saturday Academy immediately. Saturday Academy and focused tutoring will be constantly evolving where students will receive specific lesson plans to meet goals. There are assessments after six weeks to see how far they've come.
- If a student has an "A" they are advanced in that subject, if they receive a "B" they are proficient, if they receive a "C", a 70-79, then they have basic knowledge of that subject. Anything under that 70, that student has to attend summer academy for two weeks in that specific subject. At the end of those two weeks, the student will have to take a test showing that they are now at least at basic level in that subject to be promoted to the next grade.
- We've drawn a lot from Doug Lemouv and his teaching techniques. I've been fortunate enough to speak with brand new teachers over the years and it's exciting to be able to provide feedback to teachers quickly and give them methods to be successful. How do I get children engaged, for example? We're looking at utilizing different techniques; turn and talk, different drills, etc. One of our core beliefs is having exceptional teachers to reach our goals, not just being knowledgeable of content, but also possessing pedagogy and techniques. We'll have extensive pedagogy training time including role playing. It's important to provide teachers with techniques that can be used in real time, that have immediate results.
- Our target population is low income and kids in the achievement gap. We assume that most of our kids will need extra help which is built into our regular schedule. We have Drop Everything And Read Time, tutoring, summer and Saturday Academy. Our staff and management will do whatever it takes to support each individual child, no matter what their need.
- Our data analysis is focused on creating supports necessary. Once we have children's skill levels identified we can then form small groups for tutoring. With regard to Saturday Academy, we'll be front loaded at beginning of the year. If fifth graders don't meet benchmark goals they will be in Saturday Academy very quickly. We'll know very quickly. Focused tutoring and Saturday Academy are constantly evolving. We set specific goals for children; lesson plans for the child's need. Then there is assessment so they know when they achieve their goals.
- With regard to struggling students, at the end of the year, as far as grades, if a student has an A, they advance, B proficient, C basic knowledge, anything under

70, they have to attend summer academy for two weeks for that subject, then they have to take test to show they are basic or proficient to advance to next grade.

5. Describe the proposed model of teacher observation and evaluation.

- Within guidelines of the Department of Education there are requirements for formal teacher evaluations three times a year. There is also the MCAS, which is a wonderful tool but we need data more often than that. The same goes for teacher evaluation; I want to be evaluated much more than three times a year. We need on a more regularly basis. That is how we can develop teachers and maintain teacher retention in schools. I've seen this work so often and this is what I will do: As a school leader of Argosy, I will visit every classroom every morning and write a quick evaluation of teachers. I'll be writing three goals per observation; maybe there is need to circulate or a positioning issue in classroom for example, then I'll send that off and by mid-day, teacher will have seen their email and put into place that feedback. These evaluations will be ongoing throughout the year and we'll also have various one-on-ones as well, as well as different evaluations including videotaping a class room and identifying issues with teachers.
- Our slow growth model will help Ms. Pavao. It will allow her to spend more time in classroom and give feedback to teachers.

6. Describe the proposed model for professional development for teachers.

- One of the great things about charter schools is having the freedom to develop curriculum and to have autonomy over hiring and budgeting. We've created a schedule which allows for 27 days of professional development, including our three-week summer orientation to really help build school culture. Also, every Friday we have early dismissal and three hours of professional development, which is targeted at reviewing data from the week and looking at student performance and coming up with intervention strategies, tutoring groups, lesson plans and reaching out to parents. Professional development could also include going to a Weekend Warrior programs or visiting other schools.
- We'll have follow-up to ANet testing professional days as well.

Promotion and Graduation Standards

- 1. Explain the grading system you have chosen to use which includes letter grades, percentages, and rubrics. Is this a school wide choice or is there teacher choice depending on what is being assessed? Are grades on report cards percentages? Explain the differences amongst mastery, proficiency, and basic competency levels of student achievement.**

- We're continuing to develop this based on best practices at top performing schools. We're developing a report card that clearly communicates to the child and family how students are actually progressing in terms of what they can do. Important component: What are children actually able to do? How do we best measure that? How do we best communicate that?
- Data informs the instruction and how the grades work out.
- I've seen there is a gap between in-class grades and MCAS results. There is clearly something wrong there. Mastery means is there critical thinking around applying what they've learned to other sets of problems? So, mastery is taking what you've learned and applying to problems that you haven't seen before. Right beneath that is just a little less than that. They understand how to do the work and they can probably get an "A" and score proficient on MCAS, but they might be missing some depth in problem solving. Then a baseline is what you've been able to memorize or regurgitate for a test, but not really being able to communicate that with words or thoughts.

2. Describe the development of the proposed standards for promotion. How will you adjust your promotion policy for English language learners and/or students with disabilities?

- With our English language learners, everyone is still held to the high standards. We need to work with them more to get them to at least a "C". They won't be promoted without a "C" or better.
- We also have to be aware of special needs students. For students who have IEPs for example, they might have different learning goals than those who are not on IEPs. We still have same expectations for ELL, special education, etc. The bar is always high and goals are set. We'd be in compliance with IEP guidelines, but the promotional standards wouldn't change.
- We acknowledge that all our students have to take the MCAS with or without accommodation and that our ELL and special education students have to be in the average yearly progress numbers. Promotional standards won't be different. We will help everyone to learn and improve.
- There is social stigma around retaining a student. It's very serious and emotional for families. We promote our scholars when they've earned the promotion. We think it's cruel and not appropriate to advance a student without the necessary skills to succeed in the next grade level. It would get worse and puts more pressure on families, directors and teaching staff.

3. Describe the development of the proposed graduation policy.

- We believe very much in backwards planning. We have a college-bound goal of getting 100% of our students to and through college. We've been having conversations with administrators at college level, finding out what are the expectations. What are the struggles and problems when students are at college level? How to be successful in college? It's about disseminating our information and expanding our goals. We want to help the colleges as well. Colleges should be teaching a college curriculum, they shouldn't have to teach high school curriculum to 19 and 20 year olds. That means we aren't doing our jobs at middle and high school levels. We will resource Boston Collegiate to develop end of year comp assessments, but it's important that we write our own assessments. We want our students to be, not only academically prepared for college, but also knowledgeable as to how to search for colleges, and how to obtain skills that they need to do a college application, the personal essay, and the personal interview. We're looking at high performing private schools, charter schools, and public schools and we'll use what we learn from them to build our college skills program. We want to be thoughtful and always think, "How can we improve?"
- We'll have a demanding focus on math and literacy. Community colleges and state schools constantly have to re-teach basic math and literacy.
- We're going to have AP classes, which is great preparation for college. For example, simple note taking during classes is something that really prepares students for college. Accountable talk, which is in our curriculum as well, is great because at college you're expected to communicate your thoughts in complete sentences and speak loud and clear.

School Characteristics

1. Describe the differences between the middle school and high school programming.

- It's very important to be in tune with development changes for certain age groups. If a student is struggling, you can look at what typically is the problem at that age group. The DREAM program will work exceptionally well for middle school kids and the high school student will be framed around DREAM goals but not motivated so much by the DREAM dollars. At the high school level, they'll be motivated by their responsibility, their ambition, their goals and intrinsic values, which comes from having a structured middle school background.
- When we visit Excel and Boston Collegiate, we learned that they do the gradual release program also. Upper grades worked much more independently and have more responsibility. The classes were more open discussion then paperwork based.

2. How are teachers supported by school leadership to create sustainable working conditions?

- Kristin has designed it so that teachers aren't teaching classes all day long. There is time for professional development during their day. It's a long day 7:30 to 4:30. Teachers know that when their day is done they aren't going home to do hours of work. A lot can be done with the support that they have during the work day.
- A common criticism with high performing charter schools is that it's really hard work. You have to have this crazy focused mentality toward work. In my experience, great teachers are working a ton of time no matter what school they work in. They put in the time because they know that's what is required. It's not work to them. When teachers are successful they want to be part of a work focused environment. Offering professional development and offering competitive salaries and benefits is key and important when it comes to how to sustain the school over long term.
- At Excel Academy we saw a 40-question test in 2 minutes and the results were given in 2 minutes. I remember when I was in school, that test probably would have gone home with teacher but all of that would be done within the time frame of the school day.

Special Student Populations and Services

1. 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?

- We used the numbers that the district has for estimations for special education and ELLs. As a board we've consulted with other charter schools and learned about their practices and started familiarizing ourselves with laws and other aspects of special education and ELL instruction. We've had discussions about remediation techniques, including the Wilson method which you can use for ELL or special education. We are learning and will continue to learn when we are chartered. The board will work with management to make sure highly qualified staff is hired and if we need to contract out for OT or PT that will be done. We're also cognizant of the new WIDA standards that the department has transitioned to for ELL instruction.

2. The application clearly states the commitment to meet regulatory requirements in responding to students' needs. Please provide examples of how the proposed school will respond to different students' needs.

- We're a public school and we can't discriminate who comes into the school. We have a legal and ethical obligation to educate all children. The basic curriculum will help all students including special education and ELL. We have double literacy and math and the extra tutoring if need be. Once lottery is done, we have a parent questionnaire to identify special education students. If there's an IEP already in place, we'll certainly comply with it. Using enrollment and assessment

data we can see how our special populations are doing. Our goal with special education is that the children are getting their free and appropriate education according to their specific plan. With ELL, we will focus on reading and vocabulary. We have eight years of Latin, with an initial focus on root words, which will be very helpful in building vocabulary and reading. We also have double literacy everyday which will help our ELL population. We hope some of our staff members will be bilingual. We will have our reading and writing teachers dual certified in ELL instruction. We'll do whatever we can beyond being compliant so we make sure each child's needs are being met and addressed.

3. Please describe how services for English language learners will be delivered within the school day and the proposed staffing to implement this programming.

- We'll be using the sheltered English immersion. Everyone's needs are different, so some children will require pull-out, others may need just the extra accommodation in the classroom.
- We think it's important to have a developing relationship with the district to ensure that we get the IEP information and records and reports that already exist with special education students. Our enrollment goals are targeted to at least maintain what the district is serving for special education and ELL students. It's important to talk with families outside of required meetings. How is the student doing at home? How is he handling the workload? We want to have those conversations so that we'll be developing those relationships at school, but at home is important as well. Having conversations outside of the yearly IEP meetings is great way to stay on top of that. We'll be looking at data on a weekly basis so we will see trends on a shorter term. We'll train professionals to meet those needs.

4. Please describe how services for students with special needs will be delivered within the school day.

- There will be flexibility with schedule so there is time to plan, to communicate and to develop lessons.
- We have a thoughtful mindset around the facility and having the space necessary. We have certain goals in our enrollment and recruitment, but not knowing what those populations will actualize to is something we need to be facile around. We know that we need space, and we'll be flexible around space. We seen pullout happen in a community room, in cafeteria space, just at a desk right outside of a classroom. With pullout, the instruction is more important than where that instruction and support takes place. We do need to be flexible around that in terms of the scheduling and the square footage in our building.

5. Please explain the special education staffing model for Years 1 and 2.

- We have been thoughtful around learning more about the needs of children, staffing, and compliance with what's required for staffing for special education and ELL. We've talked to other schools about goals in the beginning; how did you monitor and evaluate on an ongoing basis? It's important to look at budget for planning and hiring. Conservative budgeting and plans are important. When federal startup money is more obvious to us, we can certainly come back into the program and that's one of the first areas we'll be looking at; how do we continue to make sure we have enough people? One of the changes we've made is that we'll have a full-time special education teacher for year 1 and that person, in conjunction with the director of academic achievement, will provide instruction and take care of the necessary reports and compliance. We'll continue to grow a fulltime special education person per year.

Governance and Management

1. What do you think are the primary challenges the board and school may face if chartered? What skills and knowledge does the founding group possess to address these challenges? What support will BES provide to the board if the proposed charter school is granted a charter?

- We've talked about challenges. I'm a commercial developer in the city and I know it's important to have a facility readily available for students. I do lease and manage a lot in the city, so that's my priority. I have expertise in this. I am readily connected to commercial developers in the city. There are 12 elementary schools available that are vacant. Staffing is a key component also. We need highly qualified staff available to us. We also need to make sure that we have all our human resources people in place, our payroll in place and our benefits in place for our staff.
- We recognize that not being in a major city, recruiting could be a challenge, but we'll use our networks; personal networks, BES, and Teach for America. We are prepared to do a national search if needed.
- A goal of ours is to meet with families, get background, identify early on what the IEP and ELL needs are in our community, and that we hire the most successful employees and staff for students.
- In regard to recruitment and enrollment, with 600+ signatures from parents, it won't be tough to find the children that we need.

[Follow-up: "Are all the 600 families' potential 5th graders?"]

- The 600 signatures are not all potential 5th graders though. We plan to disseminate information to every 4th grader in the district.

- Funding is an issue. It's always going to be an ongoing issue for us. We'll get funding from city. We want to bring in \$150-300k a year in fundraising. There's about \$85 million available in foundations in Fall River. I'm a tech individual and a Microsoft partner. There's the Bill Gates Foundation that gave \$3.25 mil to MATCH school, which was interesting. Bill Gates Foundation gives to about 20 schools throughout country, so we'll look into that. Hopefully I can use my leverage with that.
- Cash-flow management could be ongoing challenge for us. We're going to keep a close eye on our budget. With governance, we need our leadership and bylaws in place, specifics on running school, and fiscal policies.

[Follow-up: "What is your understanding, as a board, of the support Building Excellent Schools will provide to your charter school if it should be granted a charter?"]

- I think we all think of BES as a consultant firm. They are certainly not a management company. They aren't going to tell us what to do. They will be there along the way for structure, if we need them during the audit time, and those types of decisions.

[Follow-up: "What is your understanding of the relationship? Formal? Informal? Contractual?"]

- Kristen has a fellowship with them that expires in June. She'll get support from them up until June. At that point they'll still continue support. It is a part of the budget. It's an actual service contract.

[Follow-up: "What's BES role in terms of this school?"]

- BES shares the successful information that has worked in their high performance schools. They allow us to utilize working concepts. They have proven track record, so it's nice to have their resources at our fingertips.

[Follow-up: "What does this actually look like? And how much are you paying them?"]

- They brought in real estate expert, Bob Baldwin, with expertise in charter schools.
- BES is a non-profit organization. They will provide us, through Misha, with training in operations management and governance.
- They share the curriculums, procedures, and networks with us. It will cost \$50,000 a year.
- They provide great information including stacks of profiles of schools.

- With regard to the concern of recruiting high quality teachers, I think it helps that the cost of living is very low in Fall River. This will give us a better chance of recruiting.
- Kristen has touched so many people across the nation and has built a lot of relationships, so that should help if we need to do a national search for teachers.

2. Please provide examples of board versus administrative decision making.

- Management does and the board oversees. It's the management's job to put policies into place and implement and the board oversees that we are meeting our goals.

[Follow-up: "Can someone give an example of a board level decision versus one that would be delegated?"]

- The board hires the Executive Director. The Executive Director hires staff and determines needs of her staff. The Executive Director comes to us with salary ranges, which we will approve, but we will not micromanage her position.
- We would not get involved with immediate family/student concerns. We expect Kristin to handle that. We can't be involved with day-to-day operations. We have confidence in Kristin as an Executive Director.
- (Proposed school leader response) Staffing and human resources are responsibilities of the Executive Director, as well as the fiscal management of the organization and ensuring that the staff, teachers and students have all the resources they need to be successful. Also, particularly in the early years, improving revenue streams through private funding sources; we share these responsibilities, but I think the day-to-day management is my responsibility in terms of managing situations with families, students, and academics. The governing board is responsible for making sure all of those resources are in place. As well as asking real questions around dashboards.

3. What resources did you use to develop your enrollment policy, recruitment and retention plan, and board bylaws?

- We used a template in our bylaw section from BES schools to set our bylaws and recruitment and retention goals. We're using their template, but we'll change in compliance with law if need be going forward.
- As far as recruitment of our students we are expecting to enroll, at least 21% would be special needs, 23% would be ELL, and 78% would be student population that receives free or reduced lunch.

4. What plans does the proposed board have to recruit additional members who could contribute to the existing diverse skills and qualifications of this proposed board?

a. What qualifications are lacking from the proposed board presently?

- We're looking at adding another member, perhaps an accountant.
- Also an additional attorney with municipal and charter school law experience.
- I bring a lot of municipal background to the board with 35 years experience of municipal budgeting and running meetings.
- Also, possibly someone with human resources experience as we move forward. And education also.
- Also, perhaps someone else in marketing as we lost a board member recently with a lot of marketing experience.

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

- Are we doing everything that we are supposed to do? We'll monitor if we are reaching our goals. Are we meeting our financial goals? Are students improving? Is our enrollment in place? Do we have a healthy waiting list?
- We'll utilize our annual audit as well, because they review policies, procedures and cash flow.
- There are really three criteria. They are academic performance, fiscal responsibility, and adherence to our charter. Those three things are what we are accountable for.

6. Board: Describe how Kristen Pavao was selected as the proposed Executive Director and why she is the best candidate for the role.

- Kristen has all the qualifications to be successful. There are three main things to consider. One: She has teaching experience and has had success in charter schools and traditional schools. Two: She has business experience. Three: Her fellowship with BES which is rigorous and selective. She has access to a great network because of it and she's sourcing it, which is benefit to her and us as well.
- She's probably the most enthusiastic and inspiring person I've ever worked with. We get drawn into her.
- The work and time commitment that she puts in gives me goose bumps.

- The template of the school is time management, efficiency, organization, and preparation. She is a reflection of the school she wants to run.
- She has high expectations of herself.

[Follow-up: “What are her weaknesses? What are you looking for as trigger points?”]

- There will be annual performance evaluation, academically and financially. She has high management skills and she’s a results-based person.
- Weakness will be the financial portion. Board will support on this as well. Hiring business manager will be important; we’ll help on the financial side with regard to finance committee and audits.
- One of her weaknesses is in real estate, but we have Michelle Pelletier for that.
- She’ll have a contract detailing her job duties very specifically that she’ll have to sign off on. We’ll review her performance by using dashboards, but also teachers will get a say through teacher surveys. There are parent surveys as well. Governance committee will put together the annual performance evaluation report. Kristen will sit with board chair and review that and it will become part of her permanent file.

7. Proposed School Leader: Describe how your professional experience and the Building Excellent Schools’ fellowship have prepared you to be a charter school founder and leader. What support will BES provide to you if the proposed charter school is granted a charter?

- I’ve had experiences in business world, startups in restaurant, and also human resources development and management in the corporate world. I also have background in early education and middle school education, and educational mathematics. I have experience teaching SAT prep classes to inner city low income minority children. In relation to the BES fellowship, I’ve gained extraordinary experience as well as unprecedented access to curriculum, leadership, finance, human resources, operations, developing a leadership voice, governance training, and law as well as having resources as to what has worked in past
- This is an ongoing relationship with BES. BES is continuing to develop its own support system for longevity in the charter school network. They provide support to identify leadership, curriculum and outcomes, and share best practices. BES is accessible for questions. Through the fellowship and with BES, we continue to visit other schools and provide support and BES sets up meetings with school leaders. BES is 100% available to the continued support and success of the school and school leaders.

8. BES representatives: Describe the support services provided by Building Excellent Schools to the proposed school if chartered.

- I can talk from a leadership and academics perspective. Hiring is key. So working with an authorized fellow who will then be a leader identified by the board. We'll help screen resumes effectively and work with them through the interview process. We'll sit at the interview table with them and do phone screens with them. The decision about who they hire is theirs, but helping them hire effectively is a critical part of it. We'll also go over professional development plan with them for the summer; the time, the materials, the communications before staff arrive. We'll also be doing cultural audits of the school and report to the board chair. Often vet the comprehensive exams used at the school.
- In terms of the \$15K of consulting, in general we've thought about it as approximately 120-150 hours per year of services. We don't clock it the way that a legal office would clock it. We keep general frames around it. We propose a type of work that would fall in those parameters. Some of that time is individualized to the school leader.

[Follow-up: "Is there a commitment that you participate in the Connect to Excellence for two years? What happens after the two years?"]

- There is a commitment that we participate in the Connect to Excellence two-year program. After the two years, it becomes very individualized based on the school. It depends on what the needs are.
- In the area of governance, there are three things that we do broadly through Connect to Excellence: #1 – Making sure that each school has process for recruiting new board members and that annually, they are assessing what their needs are on board. #2 – Strategic planning. Typically I will do a full day session of strategic planning for each board, where we will identify goals for year, create detailed action plan detailing which committee is responsible, how, and when. #3 – General board development. Making sure the board has right committee structure in place and that those committees are functioning properly as well as making sure that the board understands the difference between governance and management and its compliance responsibilities and all the regulations that govern a public entity.

9. How will the board and school leadership evaluate the services provided by BES?

- We've worked with them for a long time, since the beginning. We will make sure they adhere to contract. We'll evaluate them though, just as we evaluate everyone else.

- We've worked with them since the beginning. We will continue to evaluate their services based on the contract they have signed. We think they will exceed, based on what they have already done.

Facilities and School Finances

1. What progress been made with the sites that you have identified for potential school facilities?

- We've looked at a couple prospects. There is the Belisle School on Clarkson Street and the Notre Dame School in the South End. We are trying to locate more on the South End of the city. We are still considering things though. We have some time.
- We've submitted a meeting request and an agenda to both the Mayor and the Superintendent, and a representative from the school board, to start dialogue around the vacant district space. We are excited about the opportunities. We are confident about the real estate opportunities in the city.

2. How was your budget developed? Explain the identified discrepancies in per pupil tuition (used \$13,550 instead of \$9842). Explain the \$200K private grant indicated in FY2014 (pre-operational year).

- The per pupil tuition expenditure, the \$13,550, that was the figure that we started to build the budget around through support from BES. I wrote the budget in conjunction with Mrs. Walsh. We also had tremendous finance support through the fellowship looking at each line and determining what it means, how it affects student outcome, and what is regulation and law. We now know through the process that the \$9,842 reflects a more accurate per pupil and per pupil expenditure. The \$13,550 came from per pupil tuition expenditure for Fall River on Department of Education website and not from the application.

[Follow-up: "To what extent did the board or any members of the board review the budget prior to the submission of the final application?"]

- We discussed the budget overall, looking at the hiring, facility, meeting needs of special education and ELL students, and positive cash flow. We talked to individuals on board with expertise in finance and budgets. I gave them \$13,550 figure and built it from there. The original budget represents logical thinking and planning to ensure compliance and support around facility and the program. The amended budget does the same. The adjustments and changes are made around things that we would ultimately love to have such as our bonus merit program for teachers and teacher fellowship program. We made a small adjustment in square foot per student through some research. We needed to think creatively and thoughtfully as to where can we make some changes and still ensure compliance in our academic program.

[Follow-up: “Where are the biggest line item cuts? I see a pretty big line item cut in teacher salaries. How will this impact your teacher recruitment for high quality staff?”]

- With regard to the salary cut, we’re developing relationship with Teach for America. We have access but we need to work beyond that and continue to network. We need to hire the most qualified teachers. We’ve also looked at what district teachers are making and at what level. Teacher salary is at 44K, which is competitive with a third step teacher with a bachelor’s degree. In year two, we hire at 50K and bring the first year teachers up to that level.

[Follow-up: “Did you change your FTE staffing levels in your program design? What got cut?”]

- We made modifications in the Math program. For example we have double math and financial literacy in our initial program. We have three fulltime instructors providing those services. We’ve also been flexible in that we now have the Director of Academic Achievement at half time delivering math problem solving and the other math teacher teaching financial literacy because it’s two days a week. We also thought about ELL and have done research on hiring double certified reading and writing and ELL and then in year two hiring a full ELL person in addition to the reading and the writing. We realize we need to be flexible in that and we have some money built into the budget around recruiting.
- There will be staffing changes. We’re delaying more progressively some administration positions, for example, the Development Director and Dean of Students are delayed for a year.

[Follow-up: “What is the change in technology?”]

- With regard to the technology hit, there is a major thought around budget and big ticket items. We’ve been careful to ensure to have an excellent teaching staff and administrative staff even in a conservative year one. We can deliver exceptional program without a computer lab in classroom; research shows this. We’ll have fundraising for a computer lab in year one. We know we can be successful without it, but it is one of our goals. It’s not necessary in year one to have computer lab.
- Our budget is conservative and doesn’t show a lot of grant money that we believe we can raise. With the per pupil number, we know that this changes on a yearly basis, so we have to be flexible in our budget to be prepared to deal with those changes.
- \$200K is from Amelia Peabody Foundation.

[Follow-up: Have there been any discussions whether size of the school in relation to the size of per pupil expenditure for Fall River is the appropriate, optimum design size?"]

- With regard to school size, it's clear to us that Fall River needs a small school. We don't want big classroom sizes. We feel this is key to the success of the organization.
- Teacher-to-student ratio is very important and is a consistent factor with other high performing charter schools. It's particularly important for providing services to special education students and ELLs. Fall River has gone through change around school design. They've gone from twenty-plus neighborhood schools to very large, big-box schools. The academic struggles are experienced through the big box philosophy. Parents are really drawn to the idea of a smaller, neighborhood philosophy school. We are better prepared to fulfill needs of community with small school. We will be better apt to provide the services and makes changes as we need to.