Brooke 4 Charter School Questions as derived from panel and documentation review

- 1. For the record, please introduce yourself and indicate your position on the board or at the schools. Please include the number of years you've been involved with the organization and a brief description of your history with the organization. If a board member, please also describe the areas of expertise you bring to the board and which committees you are involved in as well.
 - Scott Oran, Board Chair I'm chair of the board. I've been on the board since 2010 and I've been lucky enough to see the opening of Brooke 2 and and look forward to the opening of Brooke 4. I'm on the finance, governance and facilities committee.
 - Imari Paris Jeffries, Board Member This is my second year on the board. I'm a resident of Rosindale where the first Brooke was started. That's why I have interest in school, because it's a school in my community, where I live with my family. I'm excited to be here.
 - Bart Bussink, Board Member I've been on the board for something like 6 years I believe. I'm mostly involved with governance and facilities. I'm excited to be here.
 - Jake Grossman, Advisory Board Chair I'm on the advisory board. I'm involved with the development committee and the facilities committee. I've been involved with Brooke since 2006.
 - Jon Clark, Network Co-Director I'm the other co-director. I'm in charge of everything non-academic; operations, the executive side, outreach and community relations. I was the founder of the original middle school in 2002.
 - Kimberly Steadman, Network Co-Director My role in the organization is that all the principals report to me. I mostly work with principals and Cristie our director of student support. I've been with the organization since 2004.
 - Scott Knox, COO I'm currently in transition right now, but I was, and still am the Chief Operating Office and moving into being the Chief Development Officer I've been with the Brooke since July 2010.
 - Cristie McGrath, Network Student Support Director I've oversee special education programs and ELL. I've been involved for 8 years.
 - Laura Cushman, Board Member I've been on the board for two years. I got involved with the Brooke because of my work with the New Schools Venture Fund and our support for growing charter organizations in Boston.

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

- 1. How has the board assessed demand for Brooke since the opening of two additional schools and other Boston and Chelsea charter schools serving similar grades (K-8 and 5-12)?
 - The proof is in the growth of the waitlist from 1,500 to 4,000 children. While there hasn't been any independent market research, the demand seems overwhelming based on our response from basic outreach.
 - We have a school opening in Lena Park (Mattapan). We're considering a possibility to build an additional school on that site. Finding sites isn't easy. We'll be looking via group of realtors that we've used. We don't have a specific location in mind.
 - Brooke 2 would be interim an location. This has been approved by the school.

Educational Philosophy, Curriculum and Instruction

- **1.** Describe the progress of the process to align the Brooke curriculum to the Common Core State Standards.
 - With the Common Core we've taken a few-year view of our transition, especially with the math standards. We started transitioning last year with the curriculum and we're in a good place for this year. There are a few things we need to align with for next year to make that transition seamless. Most of the work that needs to be done is with fraction and decimal work. For English language curriculum we are more aligned, with more focus on informational writing and informational reading that is very clear in common core. As a college preparatory school, we've been focused on informational writing as much as personal narrative writing. Also, in our K-2 we've been using reading assessments with fiction and we added non-fiction sessions about three years ago. We're focused on kids doing close reading and professional development. Our ELA is in a really good place for the Common Core transition. With the PARCC, there are some things we still need to work on. When we get more information on what the assessment will be, we can backward plan from there.
- 2. Describe the progress of increasing the rigor of the middle school curriculum to address students rising from elementary grades. How has the curriculum and pedagogy changed as a result (e.g., teaching 5th grade for a new Brooke might be very different than at the flagship)?
 - This has been an issue for us. Feeling like our original school that has been full grown for a while should be steady state and it's not because this year our first group of kids who came from elementary school are in 7th grade so the whole 7th grade curriculum is new; all the standards are new. I would say 10-15% of those

changes are Common Core changes, but the rest of it just our kids coming in from the elementary school and just have a different background. Our 8th grade will need to be more robust next year as a result of this.

- Our students are much more spread out in their skill level when they come to us in 5th grade. So our 5th grade at our two schools, Brooke 2 and 3, when those are incoming grades, those aren't self-contained models, instead there are two teachers. We call them semi self-contained. There is one teacher who does ELA and one who does the math and science. We do that so teachers have time to form small groups and help students at different levels. We have network-wide assessments. Fifth grade takes different ones, so Brooke 2 and 3 take one set of assessments and Brooke 1 takes another.
- In the new schools there is much more focus on tutoring and small group instruction. There's also more time for discussion in the new schools.

3. Describe how Brooke prepares its graduating 8th graders for the challenges of high school. What challenges have been encountered?

- We prepare students for high school in a couple different ways. We prepare them with character education. There are a couple of segments that focus on that transition, beginning with the application process, what to expect in high school, how to prepare, and focusing on transition. Teaching students to be more autonomous, asking for assistance from teachers, asking for feedback from teachers and preparing for that transition from 8th grade.
- We're also constantly getting information about our alumni on how to make our K-8 experience better. We've learned that foreign languages are difficult for our students. We have therefore added Spanish in Brooke 2 and Brooke 3 and we hope to add at Brooke 1 as well.
- We want to build enough of a foundation of Spanish or another language so they can be more successful with it in high school. There is a lot of reading in high school, so we teach them a lot of reading strategies and how to be more efficient. We also focus on organization, particularly this year, as well as participation.

4. What student data, if any, has been collected to support that Brooke students enter into, persist, and succeed in high quality college preparatory high school programs and post-secondary education?

• We've collected some of the more basic data points; high school graduation, and retention between semesters in college. We've been tracking SAT scores. We're doing more to look at interim grades, and attendance of 9th grade and our youngest alumni.

• We know 90% graduated and 70% went to college. Compare to Boston Public Schools. End of story. That's the headline.

Assessment, Promotion, and Graduation Standards

- **1.** How has Brooke's assessment system evolved to support network level vs. school level analysis of student data? What changes have been implemented and why?
 - There have been huge changes. It's a totally different system. We have internal assessments that we do in reading, math, science and social studies. There are 4-5 a year. They are consistent across school except for 1st grade incoming, which is at Brooke 3 and it's only about half aligned. Fifth grade at Brooke 2 and Brooke 3 are not aligned but will be by the time they get to 6th grade. The network assessments are all created by me. They use a lot of old MCAS items; they use some that I've created; they use some from other states. We hired a data manager this year who puts together spreadsheets across the network. When an assessment is given, within 24 hours he has all the data for principals and teacher. He also trains teachers on data analysis. We have data meetings with every grade level team after every assessment along with feedback. The addition of a 4th school would not change this system; it's equipped for large scale.

School Characteristics

- 1. What is being done to insure that a tightly-knit community exists at each of the three schools? Is there a Brooke 'at-large' community? How is it fostered?
 - We have quality principals at each school who came up through Brooke with common vision of what great teaching looks like and what a positive school community looks like. They continue to develop with weekly meetings, feedback, communicating with other schools and sharing good practices and building together. I went back and taught 6th grade to get a firsthand look at how good teaching had changed and it's truly a gift to experience.
 - The focus on the culture of the school has gotten even sharper. If a teacher isn't a fit culturally, we remove them. It's a tough thing to do.
 - We also do new teacher training together, which helps us have consistency across schools. New teachers trained together for 12 days and developed good relationships. They also get every school's data performance, so they can help each other out or talk to those who are doing particularly well.
 - On operations side, we also have monthly problem-based discussions where operations bring questions regarding data for network operations team to discuss and find a solution for.

2. Describe the outreach to families of enrolled students prior to the first day of school.

- This is an area that we are trying to continue to get better at, particularly with 5th grade where some of the families may have multiple options because they've submitted other applications. This past year right away we made a phone call followed up by written documentation. We had targeted open houses, introduced family to culture, expectations, academics, and introduced families to staff, teachers and school leaders.
- We also made a great effort to identify all ELL students before classes started and met with parents before school started.

3. How do you respond to concerns from parents that behavior expectations are overly strict? How do you respond to concerns about high suspension rates for students?

- Our suspension rates are high and have been for last few years. Most people will say that "research has shown that kids that get suspended more often are at a greater risk of dropping out of school." The other part is, "Is suspending kids pushing kids out of your school?" Our attrition rate has gotten smaller and smaller over time, and we take a look at those who have been suspended and those who haven't been. They are remarkably similar. The studies that say suspended kids drop out aren't necessarily true, because it really depends on the district and what the acts were that got them suspended. We hold our kids responsible to foster a culture of safety and respect. We've only had one fight five or six years ago. We don't have fights at our schools.
- We can guarantee that children won't be bullied at our schools. We take things seriously about these things that may not be at other schools.
- When you go into a classroom, you can tell that kids know that there is a high level of behavioral expectation and it really impacts their choices in the classroom, not just academic choices, but behavioral as well.

4. Please describe the range of disabilities among students currently served by the Network. Do you anticipate this may change as you grow to scale?

- I think it would. I think anytime you have one child with a specific disability and they are the only child like that in the school, and you have teachers that don't have experience with that disability but someone who does at another school, we want to put them together with a teacher with the experience, that's what we want.
- We've had fewer experiences of kids being placed outside of our school because of TEAM as we have had parents who say "I just want my kid to be in a program where there are more kids like them."

• We are considering clustering at one school, but haven't discussed in detail.

Enrollment and Recruitment

- 1. What challenges have been encountered with enrollment processes for three schools and how have they been addressed? How do you envision possible consolidation changing your enrollment process?
 - We had many families from Hyde Park, Mattapan, and Roxbury who know about the original school and now they know about Brooke 2. They applied for admission to East Boston, and then may have accepted a spot there and then found out that they got pulled off the waitlist at Brooke 2. So we did see a bit of movement between, especially at the 5th grade level.
 - In 5th grade we learned that we have to be more focused on being much faster in following all the due procedures in our policies and also being more prompt in offering admissions and following up on acceptances with families on the waitlist. We need to do this because a lot of students have already accepted invites at other schools by the time we extend an invitation.

Capacity

- 1. During the interview two years ago, the board identified human resources, facilities, and calibration as the primary challenges of expansion. Describe how the board and school leadership addressed these challenges over the past two years. Tell us about the development of the special committee on employee compensation.
 - The employee compensation committee hasn't even started to meet yet.
 - With regard to facilities, in terms of Brooke 2, at the end of December, we acquired a building in Mattapan. This would be the home of Brooke 2. It's being designed and construction will start in the spring. It will be ready before September of 2014. This will allow Elkins Street facility to be freed up. With Brooke 3, we have a temporary building, which is owned by the people who own the Boys and Girls Club and we're actually buying another building of theirs across the street from the Boys and Girls Club in East Boston. The construction of this is also set for September 2014. Brooke 2 location has additional land that could accommodate a Brooke 4 school.
 - We've also had tremendous success with the finances of the schools. We've worked with many consultants who helped us achieve our goals including creating affordable facilities.
 - Our conservative budgeting of the first school has helped us.
 - We can also spread out costs more with more schools.

- 2. What have you learned over the past two years in opening and now operating additional schools? What successes are you most proud of? What stumbling blocks are you planning to avoid in the future?
 - Managing the temporary facilities has been challenging.
- 3. The board of trustees has recently added new board members Alex Finklestein, Imari Paris-Jeffries, and Lauren Kushman. Please describe the process to recruit, select, and orient the new board members.
 - I had chance to meet with board members and visit all schools. Through that experience I learned a lot about the school, the leadership team, and the board. So when I joined, I was already up to speed on a lot of stuff that typically you'd learn during board orientation. I joined governance committee, and engaged greatly with how the board meeting time is being used.
 - We have enough capacity to oversee four schools, but we still need to add more board members. Part of the strength of our schools is our ability not to rely on private finance. The money we raise has always covered the ramp up of the development of school. There's never really been a fundraising need for the board. As we continue to grow and get these new schools up, there is some need for private funding. We may need to bring someone on the board with fundraising expertise and/or legal expertise.
 - There's really no turnover on the people who run the operations, which has really been a strength for us.
 - Yes it's helped the board be very successful. It's a testament to the staff underneath the board; they help us be very successful.

4. How does the board assess its performance annually?

- Primary measure is the success of our students. Everything else is secondary. Occasionally an issue is raised by a parent who asks for a special meeting with board, this is rare, but it happens. At other times, Jon or Kimberly will raise issues that we'll discuss. We try to stay focused on student achievement and at the same time listen to parents when issues arise.
- Another key measure is teacher retention. We serve the families and the teachers.
- We are instituting a board self evaluation later this winter that leads to an offsite strategic meeting in March.

- Also because of our facility costs, we have some compensation restrictions that maybe our competitors don't.
- We had a performance-based bonus that we might get rid of, and instead include in salaries.

Governance

- **1.** Tell us about the process of Co-Director evaluation that occurred this fall. How has the evaluation of the co-directors changed in response to their role expanding to managing multiple schools?
 - Their responsibilities have changed and evolved as network has grown. This year is sort of a funding bridge year because we're now implementing the Race to the Top standards that will be in place for 2012-13. We just finished the 2011-12 review, which was our on homegrown evaluation system. With Race to the Top, you have a set of personal and organizational objectives. They've identified the goals, we've reviewed them and we've approved them and now we will evaluate them. We now hold them responsible for things that they can be responsible for.

2. Describe a recent discussion at the board level that reflects the decision-making process during the review of student academic achievement and the maintenance of quality control within a school and across the network.

- They both have a quantitative measurement of academic achievement which is very formulaic. It allows for the board to give some discretion in applying it. It's very formulaic grid of grade-by-grade performance, school-by-school based on MCAS achievement, and it allows us to allocate 70% of achievement bonus based on those measures.
- We will not aggregate precisely because it would obscure what's really going on potentially in each school. One of the board's concerns frankly, when Jon and Kim proposed the network, is that there are many small businesses that fail as they scale up and are unable to deal with the ramping up process. Aggregating the statistics would be a big mistake in that regard. We want to know exactly what's happening in our new schools compared to our old schools.
- 3. Describe the oversight exercised by the board through activities at the quarterly board meetings and activities at existing committee meetings (finance, development, governance, and real estate). Describe a recent discussion or presentations to the full board. Are quarterly meetings sufficient to ensure governance across a network of 4 schools and adequate access by families at each site to participate in the governance of their schools?

- It's been going on a couple years. We usually add one or two additional meetings throughout the year.
- Committees meet as much as needed.
- Also considering another meeting outside of regular meeting to focus on big picture strategic decisions. This may become a yearly thing.
- The meetings are physically rotating among schools. We changed the times of the meetings. The teacher dinner during day. The idea is, during the day teachers and students are there and can access us and we can access them and geographically, we get to see all schools.
- Everybody gets all the committee reports and there's ample time to ask questions and raise issues even if you weren't on that committee. The idea is to streamline and spend the board meeting time addressing bigger issues.

[Follow-up: "How does the board ensure scope of equity and access at the schools? How is this measure this?"]

- We haven't received any complaints in three years.
- The last two board complaints had to do with discipline issues and an illness that wasn't recognized quickly enough by staff. The parents came to the board and presented their take on it. We took it seriously and discussed it and made sure that we were attentive to the issues.
- The student is still with us and has sibling in school.
- We're very sensitive to representation of special education and ELL students. The question is complicated in terms of identification. In some way, we feel that we may get painted incorrectly for actually solving the problem. What you're seeing actually, is a school doing a really good job. The data seems to support that. The data says we take in X% and send out 50% of X, which means we're resolving problems and not forcing them out. Students come in with an IEP, but a lot don't need an IEP if they're getting a good teaching. That's the story and it's a pity that it can get twisted.
- It's been a while but we've presented board with percentage of students who are on IEPs. With incoming 5th graders it's been consistent that it's roughly 20% of our kids, similar to the district, whereas kindergarten is much lower.
- 4. The decision-making process regarding the grade span change to the original charter was multi-dimensional and robust. Was this process duplicated for the decision to submit applications for additional charters and the consideration of a

future high school proposal? Please describe the steps that were taken in these more recent decisions.

- We thought a lot about this. It stems from the fact that there 4,000 kids on the waiting list. I think there are a lot of kids in Boston that could be well served by Brooke. That's our starting point. We're trying to respond to that need as fast as we can. We thought about how there aren't a lot of options for kids after 8th grade. Additional support at the upper level will help our kids get to college.
- The four schools leading into a high school provides a critical mass for a high school at about 1,000 children.
- Our mission statement says to prepare students to succeed in college, yet we stop at 8th grade, so in a way we are failing, until we can provide a clear path for families and their children to 12th grade.
- We also didn't like the idea of the cost of running a small high school. So we wanted to make sure the high school was large enough for it to be effective.
- Also from a facilities point of view, having a small school and then having to expand it is much more problematic then coming in with a large enough school.

Management

- **1.** Tell us about the progress to identify a principal for the proposed school. What potential staff has been identified? How were they selected?
 - We have two candidates internally, it was four, but as this point it has been narrowed down to two. We've talked to them about leadership positions generally but haven't hammered anything down. We're thinking of starting with a principal and an assistant principal. We have an assistant principal candidate, who we think will be wonderful who has been in our network for a while, who we think can handle the elementary primary grade startup. A potential principal is currently a 5^{th} grade teacher who has really turned into a leader and understands the startup and the first year very well and she has said that she wants to move into a school leadership position. We've done an instructional fellowship with each of our leaders. Ideally it's a full year, although we've done a half year one when we've needed to at times. During this, I work with the fellow to make sure that they are getting developed and we come with an individual development plan based on their strengths and weaknesses. We also partner with our existing principals for assistance with regard to development. We also train in things that you'd train teachers but not school leaders, such as budgeting.
- 2. What management challenges have Jon and Kimberley encountered? What strategies have been implemented in response to these challenges?

- There haven't been any major issues, more so long-term strategic things that we're thinking about. One thing that Scott and I talked a lot about is our operational leadership and trying to help them feel like true leaders with the school. We focus so much on academics that we haven't done a good enough job on framing the essential role that strong operational leadership plays at a school. We developed a fellowship in response.
- Jon and Kimberly are excessively self critical. The operational situation of the Brooke network is very good, if not better.
- A challenge is where to give principals power to lead and where we want to make things more uniform across schools. It's good to have variation between school, and I try to convey that all the time, but I'd like to do it more effectively. Hiring is hard too. Now that we are large we have a director of recruiting. There are a lot of people to recruit. There are recruiting meetings all the time and it's challenging. We are always trying to do better and better. When we make an offer, we make an offer from Brooke Network, not a specific school. The contract specifies school.

3. What challenges have Scott (COO) and Cristie (DSS) encountered? What strategies have been implemented in response to these challenges?

- Cristie This year there was an area of need, when kids come off the waitlist in September and they are here with us for a while and we gather all this information on them and then they leave and then there's new kids. There are lines of communication that need to be tightened. We need to improve in this area.
- Scott With the operations leadership piece, how do we cultivate that initiative of ownership, we have three smart capable individuals, and also the human capital development piece for those three. Also as we continue to grow, the churn that we felt with the 5th grade enrollment. There are more 5th grade options this year, so that was sort of new territory for us. We never had a school in East Boston with families coming from the other side of tunnel. Families would switch if they had other options. The final question is around facilities, which is our biggest investment aside from human capital. How do we use that to reinforce a learning culture? We want our facilities to be a full extension of our academic model.

4. Has a Controller been hired? How was the need for this position identified? Will this new position change the responsibilities of other existing staff members? What relationship will the Controller have with school level employees?

- We filled a business manager position. As we grow we are looking to fill the gap with higher level accounting through consultant services. Business manager is fulfilling controller responsibilities right now.
- Historically, because we've gotten by on our tuition dollars, we haven't done a lot of fundraising, particularly from individuals. From foundations we've had really

strong results that helped us. But as we grow, we realize we need to develop our capacity.

- Development is an area we've known we need to work on for a while. We've been looking for a Chief Development Officer. We didn't find any who was a good fit. Scott has a lot of development experience, so we discussed Scott moving over, and it makes a lot of sense.
- We hired a controller; the person did not work out. We found someone who had a little less experience but a lot of the qualities we look for.
- He was more of a junior financial officer with a lot of room for growth. The roles changed a little bit, but we operate pretty lean and mean in our finance office.
- With approving budgets, we consolidated three school budgets and network budget as well.

5. There is a clear summary of the division of academic responsibilities between network level and school level personnel. Please describe the division of operational responsibilities between network level and school level personnel.

- We believe strongly that operational leadership has to be strong for a school to be successful. We need onsite operational people. We looked at where we can gain a lot of efficiency and support to do things across the network. One is certainly teacher hiring across schools, technology support across schools, contracts across schools and student recruitment across network as well. Director of Operations does basic paperwork with regard to purchases then it goes up to network.
- 6. It has been evident that school leadership is willing to make the hard decisions to dismiss teachers who are not meeting the expectations for professional standards and student success. Describe how new principals are supported in making these challenging decisions.
 - We've had two instances this year of letting people go. With both of them we got to a point where we observed them every week and then every day, they received daily feedback, and I checked in with principal about it every week with regard to what progress we were seeing. Both of them came to the decision to let the person go. It wasn't an unguided decision, but we all agreed. We then practiced through the conversation. We then decided how to inform rest of the staff and decided who would be covering those classes. There were a lot of constant conversations with the teachers before letting them go. We gave them very appropriate amount of support before deciding to do the daily observations. It's not easy. We tried our best to support them through a pretty tough time.

- 7. In recruiting experienced teachers, what specific qualifications do you routinely look for in general education teachers and special education teachers? What are your priorities in hiring staffing?
 - We have core qualities for teachers: alignment, growth, mindset...and at least two years of classroom experience. Our priorities over the years have been to get good student support people in place, ELL and special education people, who are mission aligned and certified. Also our goal is to get good math and science people in place. Not as big of a concern this year; they are in place. With student support, we don't expect that many openings but it's always hard to find them. Recently we've been struggling with who we want in our middle school classrooms. We want a focus on student engagement. There are a lot of candidates. We are semi-self containing through K-8. We need our teachers to be focused on developing all of their students.
 - With staffing, I'm at the point with student support as we grow, trying to figure out where the tipping point is as far as contracting physical therapists and when it's cost-effective and just better than employing someone. So that is exciting as we grow.
 - We view our associate teachers as our pipeline.

8. What if Jon and/or Kimberly were to leave? Do you have a leadership succession plan for the central support staff and each individual school? How are you developing internal candidates for leadership positions? Describe the development of master teachers and their role in the school.

- The governance committee has talked about a succession plan. Today we have three principals, soon to be four and those are obviously the school leaders. So it's not just two, you have six, seven, eight...Each time you grow the network, it becomes more important to grow people internally and to have a succession plan. The governance committee has talked about a written succession plan and we're working through it now.
- I have a succession plan of who I would like to replace me and have thoughts about who replaced that person and we are working on developing our next bench of leadership in case any of our principals leave. We have plans in place.
- We make sure that the principals have a diverse experience K-8, in different subjects, mentoring, teaching, etc.
- I have three fellows for next year if we get this charter. We training one for Brooke 3 and two for Brooke 4. It's tough for a principal to have a fellow because the principal has to give up some control over the grade level. However, with multiple campuses it's a bit easier to do. Principals are doing some of the coaching, as well as myself. We have one fellow right now training to be assistant

principal in Brooke 3.

- Our goal with master teachers is to keep them and to keep them happy and keep them challenged. So one of them is at Brooke 1 and wants to work on coaching other colleagues of his but wants to stay in the classroom fulltime, so he's doing that. Another master teacher wanted the experience of giving feedback to others so she only teaches half-time and gives her feedback to a team and another team half-time. The third one actually is interested in going into a Dean of Students role. So she'll be the Dean of Students at Brooke 2 next year for half of the campus because we're having a split campus next year. She will also be our Dean of Students at Brooke 4 if we get Brooke 4.
- The half-time teacher is at Brooke 2.

Finances/Facilities

- 1. Tell us about your relationship with the Charter School Growth Fund and the New Schools Venture Fund. How did these relationships come about and how will each relationship support the board's goals?
 - They support our goals of growing the network. Our relationship with them helped us to put some processes in that weren't in place before. We also gained Lauren as a board member, which has been invaluable. It's been great having a national perspective and bringing new practices to our network from across the country.
 - With the Growth Fund, they don't have someone on the board, we report to them every year. The biggest support we got from them I think was drafting a business plan and thinking about how we grow strategically.
 - There doesn't tend to be any conflict of interest. Our grant goes to the foundation board rather than to the school board so that's one separation that they have. But even in other jurisdiction where there isn't that separation, there aren't issues.
 - Annual meetings are great because we learn so much about other schools doing great things including stories and research.