

Bentley Academy Charter School Interview Summary

Questions as derived from review panel and documentation review

In Attendance:

Maria Belony – proposed board member

John Casey – proposed board member

Angel Donahue-Rodriguez – proposed board member

Rachel Hunt – proposed board member

Ryan Lovell – proposed board member

Christine Sullivan – proposed board member

Kristine Wilson – proposed board member

Marlena Afonso – proposed Director of Curriculum & Instruction

Shawn Berry – proposed teacher

Rebecca Lewis – proposed teacher

Brenda Pena – proposed Head of Family and Community Engagement

Justin Vernon – proposed Head of School

Matthew Spengler – Blueprint Schools Network, Executive Director

Kate Carbone – Salem Public Schools, Assistant Superintendent

Kimberley Driscoll – City of Salem, Mayor

Absent:

Amy Martyn – proposed English Language Learner interventionist

Faithfulness to Charter & Organizational Viability:

1. Tell us about the history of the Bentley Elementary School.

- As you know, Bentley was identified as a level 4 school back in 2011. We went through the process with the Department in identifying a plan for supporting the school with turnaround. Despite the best efforts of the existing staff and the principal that was appointed at that time, you know that improvement at the school was not rapid enough or strong enough for us to be satisfied with what was happening at the school. So, we are interested in the students being successful at the school and that every student in the district, at every school, have the opportunity to have a strong educational experience and that hasn't happened at the Bentley yet. And again that is not to be critical of any one person or group of people, but the bottom line is that the data indicate that there were small gains here or there, but not strong enough to signal that turnaround was underway.

Unfortunately, kids don't get a second chance. Our school committee, along with the committee, made some tough decisions, but the right decisions to bring together a group of folks to think about an alternative at Bentley. That sort of brings us to where we are now.

2. [District] What have been the specific challenges, as you see it, to both individual and collective student success at the Bentley?

- At the time I joined the school committee we were about two, almost two and a half years past the time that Bentley was identified as level 4; about a year and a half into the actual accelerated improvement plan. What we saw was very similar to trends across the district. I don't think it was a Bentley issue. We happened to have more, a greater percentage of high needs at the Bentley school. And so the issues that were occurring across the district were exasperated at the school. I think we would all acknowledge that we didn't the strength and leadership there for some years. That would have helped that school to reach its challenges in a stronger way. So when we looked at where the school was there were some sparks, some nice things happening, I think every school that is low performing has those strengths. There were certainly some strong teachers and exciting things happening, but it wasn't enough for us to be sure that those kids would have access to a high quality education across the board. That was what made us at come together as a school committee and say this is our responsibility to really look at the situation at the Bentley and say what are the barriers? We recognized that those are the same barriers. That we were laying the foundation across the district to overcome—that's alignment of curriculum; quality curriculum and instruction to go along with it; leadership; and using data to inform our decisions.

3. How has the Bentley's past performance and feedback from community stakeholders in Salem influenced the program design proposed for the Horace Mann charter school?

- Just from a statistics standpoint, the Bentley has been behind with respect to PPI targets for all kids, and then with respect to all subgroups. One statistic is also a concern, which we certainly haven't talked a lot about as well, is the fact that students that are not on free and reduced lunch are behind as well. So this is all students. I think some of the areas which we tried to address this is obviously having a lot more to time to do the work with students. So, in years past what the schools tried to do is lengthen the day. However, that wasn't done with a comprehensive schedule that keeps the same staff that was there for the entire day. So that's been a big part of trying to increase student achievement. We've increased the length of the school year as well for all students. So in the application it's K through 5. We've created a schedule that not only keeps a focus on core content, math, and ELA [English Language Arts] for roughly an hour and half each day. But also gives students an opportunity to push them to the next level no matter what level they are at. For 30 minutes for English Language Arts, but also 30 minutes for mathematics as well—and that's for all students. So it allows us, in that way, to really tailor and differentiate instruction for some of our subgroups that need that more tailored instruction as well.

4. How many days is the school year, separate and distinct from what you proposed for Summer Springboard? Is the Summer Springboard mandatory for all students or is it optional?

- The school year is 190 days, which includes the Summer Springboard program. We are looking to make that mandatory and that is differentiated between Kindergarten and 1st through 5th grade students. Kindergarten would be 185 days.

5. Tell us about how you are going to ensure “aligned curriculum and effective instruction” are being implemented within the program design.

- I think in some ways, as a teacher who has started to do this work this year, a way that has approach curriculum, which has been different than all the other schools that I taught at, has been to really take curriculum from the individualized level and kind of flesh it out from that point. So we start with getting an understanding of where these students are coming in, a lot of diagnostic assessments, and working with students one-on-one to try and get a sense of where their individual needs are. And then trying to build our program from that level of need, curriculum-wise, up. Justin [Vernon] mentioned some of the supports that we have that allow us to do that. So we started the year, we had a baseline of curriculum, and the standards obviously that we need hit. But at the very beginning of the year we had Fountas & Pinnell testing to get student reading levels, we had diagnostics for math to get students struggling math level. And then everything we created at that point was really trying to get at the most individualized plan that we could for each student. So we made plans for which students would be working with our support specialists, both ELL [English Language Learner] and special education. Working on developing small groups. Working on using our intervention time. So Justin [Vernon] spoke to the 30 minutes of ELA and 30 minutes of math. Making sure that those students’ needs, particularly the ones who are below grade level, are really being met in those intervention times and then pushing our students to be looking at on-grade level texts and to be well-supported through the use of scaffolds and specialists and a lot of other things that I’m sure we will talk about today in the plan. To really make sure that, yes, students are getting a broad education, a rigorous education at grade level. But also to be taking those steps to build the foundational pieces that we feel that many of students can get this year.

[Follow-up: How will you be supported to implement what you just described?]

- I think it starts right with our summer PD [professional development] that we do as a staff. An opportunity to certainly build staff culture and understand our strengths and challenges at teachers. And a lot of time given over to looking at the standards, big picture, looking at the standards, challenges by grade level for Bentley students. So we’ve set power standards for them. And so that was the foundation of the work. And then that work really continues on a daily basis. We have two afternoons that curriculum teams are meeting to look at their planning and short-term, long-term, their data, their culture within the classroom, regular common planning time where we are looking at grade levels at student data and what’s going on culturally, and the development of action plans

related to those things. And this is all done with the support of administration—so they are a part of the conversation. Then, on a weekly basis every staff meeting has a one-on-one meeting with an administrator—either Justin [Vernon] or Marlana [Afonso]—to discuss those goals around instruction, but also professionally.

6. Why is a Horace Mann charter school the ‘right’ turnaround model for the Bentley? Why a Horace Mann 3 rather than a conversion with Bentley faculty or a Horace Mann with union sign off? Why not an Innovation School? Why not continue with Blueprint School Network as the school operator for a second year?

- [Mayor Kim Driscoll joins the interview at this time] I will speak on behalf of the district to a certain extent. We really felt that we made strong strides with the model that we had chosen, but did not get the results that we wanted. We are encouraged with what we are seeing now and we want to find a way to make sure that is sustainable. Frankly, we look forward to when the school is pulled out of level 4 designation, but with the removal of that designation also comes the inability to maintain, perhaps, the greatness of operating in the current manner unless we have something like this in place. I’ve described in the district as not that we have given up on the school by going this route, but I actually think of this as different. I say we are calling in the SWAT team. We are really recognizing that in spite of a lot of hard efforts and wishful thinking, and time, potential, and resources, we weren’t able to make the strides we wanted to under the conventional model that we were using for turnaround work. We needed this fresh start. We want the program that is sustainable in the long term and are committed to flexibilities, the autonomies, and the structure that this new school is putting into place.

7. What specific autonomies are you hoping will benefit the Bentley?

- Well there’s a number of them that are built into the proposal that we say are already in place. Specifically around time, the ability to have flexible scheduling, teachers coming in earlier, students coming in earlier, so the expanded learning time opportunities that are different. We have a number of ELT [Expanded Learning Time] programs that are within our schools, they were hard to negotiate. This one’s a little bit different in terms of being able to be flexible with regards to the use of that time. I think that the staff hiring, the ability to recognize that we want to have the right people in the right places at the right time, that’s built into this model as well. It’s critical. And the ability to be a little more flexible in terms of their approach—the differentiated learning, the Saturday Scholars program that goes back to time, but it also goes to the ability to put that in place in a nimbler fashion. That, frankly, in a traditional district setting, it just doesn’t always happen.
- I would say it’s also about building a collaboration with the district, but also having the ability to have autonomy from district practices as well, over an extended period of time. The second thing that I would say, which is something that I’ve become more excited about over the last few months is that, generally speaking, charter schools in the state of Massachusetts are highly effective. And they do well by kids. So, the moment you enter yourself as an organization into that arena, you’re able to learn a lot more about how to move students along quicker and faster. So, just simply going through this application

process, I've been able to engage in a lot more conversations with charter school leaders about how best to support kids.

8. What metrics beyond proficiency on the MCAS/PARCC will be measures of school success?

- Talking internally and externally? So, we are part of the ANet [Achievement Network] assessment network. So students currently 2 through 5 are taking both the math and ELA assessments—that's actually across the district, not just the Bentley. And we have data meetings around those. We have an internal system called Kickboard, where we are able to have up-to-the-minute student scores on assessments. So we can see progress on a daily basis. So we are taking a look at that. We use the Scholastic Reading Inventory three times a year at the 3 to 5 right now. We just started the Lexia program. So we have that, students are using that program now as part of their WIN or "Whatever I Need" block. So that data is constantly being updated as well.
- I think from a teacher perspective we have the assessments, we have MCAS, we have Achievement Network, and then kind of what I was talking about before—starting by really understanding where the students comes to us. I think success for us looks like on every metric that we use, that Shawn [Berry] just described to you, students are making progress and we are building that foundational knowledge that students need to move on to the next grade and be successful on their grade-level test. So, whether that's they're moving reading levels, they're mastering division whereas last year they struggled, they may on the pre-assessment they have struggled. Really seeing those results as we continue come back to the data, the Kickboard system that Shawn [Berry] was referring to, everything that we put in is aligned to a state standard. So we can see, as she said, really minute by minute, really where that progress is coming from.
- And where the data action plans are coming from as well, because we are able to, if a student, or a group of students, or a class of students, is struggling on a particular skill, we are able to look at that and create an action plan and re-teach multiple teachable moments and reassess to look at student growth. And this is applied to the WIN block and the Saturday Academy as well.

9. [Board & District] What are your expectations on how you will measure school success?

- I think we are excited to look at enrollment numbers and see things like attendance and enrollment increasing. Bentley has not been, within our confines, the school that has been first choice for many families. And so, I look forward to that changing because of some of the provisions found in this charter. I do also value parent surveys and teacher surveys. We started a new process here in Bentley that I'd love to see, again, seen across the district. Looking at the teachers and also something the parents appreciated. And the type of parental surveys and teacher surveys, in terms of their satisfaction, in terms of getting to know their students better, those are certainly areas that don't necessarily show up on MCAS, but are very valuable.

- I can also speak as Head of Families, and [Rachel Hunt] had mentioned attendance, so last year our grades 2-4 students, 40% of our students were out 10 or more times. So as Head of Family, I played an active role in communicating with these families. 50% of our students are Latino. I am bilingual, bicultural, which puts me at an advantage to connect with these families. We really established very good relationships. I am also attendance officer certified, so I am able to track attendance, monitor attendance, with our attendance officer from the district. I have worked closely with her and I feel like we've made some gains. Last year, they were at 94%, right now we are 95.4%. So I feel like we are making progress, we've put a lot of different things in place—attendance letters, I am constantly on the phone contacting parents offering them support. I'm also School Adjustment Counselor certified, which puts me at a level where I do understand the social-emotional needs of our students. So not only are we looking at academic progress, but we're also looking at the students that need that social-emotional support. Which allows me to offer resources and programming that will assist those families.
- As a board we've talked about how do we know what's going on on-the-ground. We are not there every day, we meet once a month, and so, we've talked about as we developed an Accountability Plan for the school, which accounts for the big academic metrics, but also looking at the mission of the school. How do we know we are on track to be successful to and through college when they are leaving us at the end of 5th grade? And so we talked about what are the elements of the mission that we want to track going forward and how do we know that the kid has graduated. Similar to the points that Brenda [Pena] brought up about social-emotional needs, we want to figure out how do we check in on those values? How do we check in on academic progress? You know, looking at all those internal measures we using, ANet, Scholastic, etc. And have, sort of, a dashboard come to us at our board meetings and say, okay, are we on track? So that we can ask the right questions. You know, John [Casey], our key person monitoring the finances will report back to us monthly or quarterly, which is, obviously we need to have a viable organization and we will be continuing to meet kids' needs. So, really looking at what are those pieces we are going to look at every month or quarterly, so that we know what's on track.
- I think there are also some middle term metrics as well. One of the ones, specifically coming from my vantage point, Empower Schools, and having been here since the beginning is that, to dovetail what Justin [Vernon] said earlier, is not that the school just goes off and does its own thing over at 25 Memorial Drive. But that the school, probably not in its first year or second year, but eventually disseminating it back to the district and that there's constant communication between what's happening at the school and what's happening at the district, and how the two can learn from each other. That may be more qualitative than it is quantitative, but I think that's just as important, hopefully, at the end of the five years and more longer term as well.
- We have already started to partner on some of that. So the monthly walkthroughs that Blueprint [Schools Network], maybe Matt [Spengler] you'd want to take about more of the specifics of those, but it's Blueprint [Schools Network], the school leaders, and folks from the district partnering on visiting classrooms to look at implementation and how the curriculum and the teaching strategies are being executed at the district level and then partnering on what some of the responses are. So in the last report there were some

suggestions around checking for understanding and how can we work together with Justin [Vernon] to help follow through on next steps for that. Those are observational pieces, but they're sometimes just as important as the numbers that come out for the day. Because there's the teaching, there's the day-to-day support in the classroom that lead to student outcomes.

- That's one of the current services [Blueprint Schools Network] are providing. So we have five, full-day site visits. That speaks to some of the goals and some of the metrics we've talked about earlier. So it's a part of that process. We sit down and we talk with students, "Are you being challenged? How much homework do you have every night? Are you getting your questions answered at school? How safe do you feel?" And then we talk with teachers and the Math Fellows. So there's this regular feedback loop that we can provide some action steps, then provide some supports to the school throughout the year—not just twice at the semester's end and the year—this is an ongoing process. We have our next one scheduled for next week.

10. How will the district support the successful establishment and operation of the proposed Horace Mann charter school?

- This is not our first Horace Mann in our district, so we have a lot of lessons from the first time, although it's a different model with the alternative, prevention dropout program that we have. But we still have to figure out how are we going to make special education services work, how are going to make transportation services work. What about things like the school nurse, which was an off-site district program completely out of the building with Salem Community Charter School [now New Liberty]. We have strengthened efforts and we have a better understanding of what might work and what might not work when you are putting that in place. Even this year was a bit of a trial case because we had this hybrid model going on at the school. I'd like for it to look as seamless as possible, so we'll be doing all of those back office things—payroll and provided building services, custodial, transportation, and things like that. I think we have plans in place because this was a regular district school; it's a little bit easier than starting a Horace Mann school from scratch so to speak. We are provided services for a subset of school children in this building already. We need to continue to do that. We need to work with this board and this new entity to make sure nothing gets dropped. I feel like from the services perspective, how we are breaking up the pie, it's pretty clear. It also needs to allow us a lot of flexibility. That's the one thing we've learned. There will be different special education needs this year than there are next year. Transportation may work differently. We've figured it out this year. We'll need to continue to have that dialogue going forward. In some ways it won't be two schools in one, it'll be one. So the population will grow, but we'll have one less hurdle of conversations to have. It's almost three schools now—the district, and then two separate schools. As opposed to one separate school. The other piece that I think is interesting and I hope won't just benefit Salem, but will benefit others, is the ability to still treat the school very much like a district school when it comes to best practices, leadership development training, getting together to understand what you are doing that's working that we can learn from, and what might be working well in other district schools that the new Bentley can build off of. We really want that to be seamless and not have "oh yeah, that's the charter school

down the street. And they do what they do and never the two shall meet.” It’s very different when it’s born out of the same district. In fact, those are all our kids and they’re still our kids, we’re just following a different model. So I hope we’ll continue to shake it’s others worlds and recognize that this is a distinct entity. They can be more nimble. They can be more flexible. They have the ability to operate independently. But it’s still a public school and it’s not something at the end of a long list of schools and buildings that get treating like a “second son from another family”. It really is a part of our strength, and we want to build and learn from each other.

- I think we’ve been collaborating since the very beginning. And I think the key is that we have open communication and that we view this as a partnership and we work with Justin [Vernon] to share district resources and systems and structures that we have in place currently. And he can leverage those as he sees fit to the school. A perfect example is the district curriculum maps that we have established, aligned to the Common Core in K-8 for math, ELA, and science. And so we’ve made those available. We’ve met together to look at those and our curriculum staff did an orientation with the teachers before the opening of school. I’m sure that you’re customizing those, but generally it’s a starting point for the school to work with. We have district professional development with some pretty high quality people—the Teaching and Learning Alliance (TLA) is doing lots of work with us around our literacy model and we’ve worked together again to customize the supports for Bentley. So that they’re not sort of the same as the other district schools are doing, but that Justin [Vernon] has those available to him. So that we’re working with the TLA consultant comes in and works with the teachers in their classroom around best practices. But, Justin [Vernon] is directing that work. [The district] has twice a month district leadership team meetings, which is really considered a professional learning community of leaders where we are learning from each other. Justin [Vernon] has been fully engaged with that and with us. One of the focal points of this year is around the observational feedback and the principals and evaluators working with each other, bringing in their written feedback, making their practice as leaders public, giving each other feedback. We just recently had them videotape themselves giving verbal feedback to a teacher and work in small groups showing the videotape to get feedback on how was I as a leader improve my feedback to teachers and help and improve and support their practice. So, I see it as a partnership that I think is off to a really solid start and vision that can continue and we will continue to learn and work and support each other’s work.
- I think enrollment has been something we have been working on collaboratively. Because of the nature of the in-district conversion, it’s been somewhat controversial. Bentley was a low-performing school and you have some discontent on the part of maybe faculty, or families even. And that’s been a challenge for us as we look forward to a choice enrollment lottery as opposed to the district placing students in schools. We’ve been exploring what’s the most effective way to ensure that families see this as a high-quality option and are given the opportunity to put their name in. So we’ve been collaborating with [the Department] to help us out with Bentley and the enrollment process, but also just thinking about how do we get into Bentley as a district and support Justin [Vernon] as Bentley expands. And ensuring we can give that K-1 families as well, and making sure we talk to them about what next year is going to be like and why it’s a great opportunity to get first shot in that lottery for next year.

11. Rachel Hunt, are you on the charter school board by virtue of being on the Salem School Committee - is there an expectation that a member of the Salem School Committee would sit on the proposed board at all times? Or are you on the proposed school board based on your prior roles in charter schools?

- I would say both. We didn't explicitly say we would always have a school committee member. I think we thought it was important at least at the start to move things forward. And I was a natural fit because of my charter school experience. Our other in-district Horace Mann charter school does have a representative [from the Salem School Committee], but I think that was a little more explicit than in this case. We talked about it, we thought it was important, we talked about who it should be—it was me. But we didn't put it into the application as something that should always have to be there.

12. [Board] What do you consider to be your role as proposed board members?

- I come at this, albeit from two different worlds, from in my role at Endicott College Coordinator for the Teacher Fellows program. We are working to have close collaborative working relationships with the district to place our graduate students who want to be licensed teachers in year-long residencies. We are not going to place a student in a school unless that we feel the school is going to provide the supports necessary to ensure student success. With that, we want to place students in schools that are going to expose them to a more diverse population than they might see at Endicott [College] in Beverly. So this is a good opportunity for Endicott to place a small number of students starting out with a school that is not new and getting off the ground, but is an established entity already and there are supports already in place. It's attractive to us that it still would be very much would be in the Salem district, so that the supports are in place. As a board member, obviously it provides me a good opportunity to ensure that the school is going to provide the supports needed for our students. So I think it's important for me to be a part of that process, to ensure that students are receiving what they need. And so I have a stake in this. I want to the [charter] school succeed, there are various benchmarks, that Rachel [Hunt] alluded to earlier, that we would see reports coming back to the board to ensure that what the school states they are going to do, they are going to do.
- Let me combine two things here. My background is that I'm a former Secretary of Consumer Affairs in Massachusetts, former professor and chair of Communications at Endicott [College], and former Chief Executive Officer at the Enterprise Center at Salem State University, which is a small business and regional economic development growth center. They are all former because I retired in May. So, in 1987 we lived in Salem and I loved Salem and it's my favorite place in the world and I'm committed to Salem. But the schools weren't good and we left so that we could educate our three children. The day the youngest child graduated from high school we signed the purchase and sale agreement on the house and moved back to Salem that summer. And this has happened. I am not leaving again. It matters, education matters. It is about the kids—that's what this whole conversation is about. Salem is a fabulous place; it's just got this one area, until now, retractable problem. I think this school is wonderful. As a member of the board, I think we have several areas that we have to be prudent in the governance and obviously we would be reviewing the Head of School and all of the governance stuff, the financial

numbers—is the budget okay? The metrics analysis that we've all been talking about today and let me add an aside, the other metric that's not quantifiable is the energy. I was in the classroom and the energy was electric. The children loved to learn. Their faces were alive. If I had children today, and I read this charter proposal, I would send them to the Bentley in one second. The fourth option—after making sure one is prudently following the results, if they're not what we want, finding out, drilling down, and holding people accountable as the Board would through the Head of School—will be development. There will be some fundraising going on with the Board as well.

13. To what extent did the board or any members of the board review the Memorandum of Understanding (MOU) prior to the final submission?

- I was going to say that since I was a founding group member moving into a proposed board member, I will give a general overview and then let others speak as well. It was strange to move from a school in a transformational model as a restart into an application for a Horace Mann. So, the MOU was signed and negotiated long before any board members were asked to be a part of it. I certainly provided all of the documents necessary to board members and personally answered a lot of questions about the MOU specifically. But, it is also important to remember that it was defined well before the board came on. So, they weren't involved in the creation of it, but they've all seen it and have asked questions about. I could say they are pretty well versed in it as well.

14. What services do you expect from the district, what's your understanding of what would be provided by the district and of the tuition?

- I have read the MOU various times and the first question that I had was what services were going to be provided to the charter school by the district. And it explicitly says that in the MOU that there will be services provided the district. I believe that it explicitly says we are going to be \$10,500 per pupil. The rest of the services, like transportation, school nurses, all of those types of services will be provided by the district.
- As far as the budget, I've had a chance to review it and it's my understanding that it was pulled together based on the current Bentley budget. So the Bentley kind of had a track record of what was going on with that. I've seen and had questions to Justin [Vernon] and Sarah [Toce] and everything seems to be in line with what I understand is the \$10,500 was the negotiated amount that we will be getting income. I would expect that we will have a finance committee that I will be a part of as well as several other members of the board that will meet on a regular basis. We will review the dashboards, the data come back in, and making sure we have a budget that is supporting the mission. We are going to make sure that we are financially solvent. I think that the goal is to meet our expenses with the money that we are getting and then understand that if we need additional funds to getting grants and other forms of income. I think having the governance, a committee to review the data on a regular basis and report back to the board to make sure we are on track.

15. [District] How was the per pupil tuition rate determined?

- We didn't pull it out of thin air, we spent a lot of time with the business manager, Frank Power reviewing and Matt [Spengler] and company reviewing what are the costs for educating a child in Salem. And then how do we back out things into central office, like custodians, the building potpourri of expenses that we are picking up—transportation. Because we don't budget those things per pupil. So we took actual costs at Bentley when it was up and running and then tried to look at if we had to pull out those services or back charge, what's a reasonable back charge for things like payroll. Things that are not distinctly for Bentley or any one school, but they are central office expenses. We came up with a formula that we thought was reasonable based on what it would take to actually make the school be able to operate in all manner and also reflected a fair value of the services that are being provided by the district. It's purely based on the actual costs of how it was operated. How many custodians were there? What's the level of transportation? We are going into this with our eyes wide open that we have a pretty good track record of this year. Frankly, having been a regular school for all of these years, but we need to be flexible and that is certainly one of the things that we learned from our other Horace Mann charter. In one year, is just a snapshot in time, and it appears there needs to be flexibility built it—if there's most special costs or less transportation. Let's find a number that's somewhere that folks can live with and then if we have file a little more away that's great and if it's a little less bus transportation then so be it. We recognize that we are going in with our eyes wide open with respect to those formulas.

16. What are the board expectations around the MOU and what adjustments will be made before final approval based on lessons learned from your turnaround experience?

- We reviewed the MOU as if that was what we would be moving forward with as a board and as a school. I think given the services, including facilities that the school will be getting and having a per-pupil amount, which is much more tangible than other ways that funds could arise. So again, lessons learned from the other Horace Mann charter school in Salem, which is not a per-pupil arrangement. I think that feels very concrete. We understand that if our enrollment is here, this is how much we can adjust. If it goes higher, if it's lower. Also basing looking at the budget and our Commonwealth charter school in Salem, looking at the cost of facilities, I think it's a very positive arrangement financially for this school. So we feel good about the arrangement and resources and services vs. per-pupil. I think it's a matter of getting into the routines of how that will work with the district.

17. How will the per pupil tuition rate be adjusted annually and communicated between the school and district? What does the board's discussion look like regarding adjustments made to the per-pupil tuition?

- I think if the amount were to be reduced, we would probably want to look at administrative positions, supplies, and things like that, without the education of the kids—the direct services that they're getting.

- I can share with you that we have had those growing pains with our other Horace Mann charter school. I think the best thing that we have done there and I think we will continue to do is communication. We meet quarterly as a joint group, the school committee and the board to review where things stand, expectations for next year, what are our expectations for next year. Trying to get everybody on the same page. What if you have a huge bubble to school pupils here, what is that going to mean for our budget? Is now that formula a little less fair to the district? There's a shared interest in making it work, much like our existing Horace Mann charter. We want this to work, we want this school to be successful, and we value the work that is going on. How do we get there? Are we budget crunched? Let's sit down and talk about it, here's what we are experiencing, how can we work together to adjust that? The same goes, if there are issues on their end that we're going to be talking about them on a quarterly basis. So there are no surprises and the share goal of success and how do we go about doing it. That of course is looking through what the circumstances are and trying to reach an agreement. So I would suspect, at some point, there's going to be a discussion around needing more money or we need a different arrangement with respect to services. We are going to have that through communication. Maybe at some point you'll want take on special education or take on ELL services. I think through communication, we can figure that out.

Academic Program:

18. Describe the current intersection of the school and the district in the provision of special education services to students with disabilities, and ESL programming for English language learners. How will this change if granted a charter?

- Basically, right now, staff members—whether they be paraprofessionals, teachers, or teachers servicing students with IEPs or students with ELD levels—are on our school budget. Folks like a team chair or someone who is a school psychologist, they'll be on the district's budget. So that team chair will help facilitate IEP meetings, etc. and we also get support from the district currently in around their head of the English Language Learners Department. So they'll send out communication to us to make sure we are on the right page as far as ACCESS tests, ordering those types of things. What I would say, we are looking to make a slight change for next year. We really want that role, as far as team chair to shift a little bit, and have that be someone who is more of a student support coordinator. Put a little more of an emphasis around supervision, emphasis around supporting teachers that are in those interventionist roles, to supply high-quality instruction to our students. That would be probably the biggest change within that area. We won't necessarily have to adjust the budget to make this change happen. If we are going to keep the salary associated with that position similarly, we on our side say we want to have this position be a little more broad, I think that's a discussion we can have and we are already in that discussion with the Director of Pupil Services.
- So in that instance, it's like we want to take greater responsibility in that, now we are responsible for, and we feel good that we are responsible for, because ultimately as a district our kids are well served. To me, it's really about that level of communication. Governor Baker, God willing gives us this huge increase in Chapter 70, I could see the school coming back and saying could we share in some of that increase. Let's sit down

and talk about the numbers and what do you need it for and how is that going to work. If there are benefits and reasonable opportunity for us to work together than we want to try and accommodate that. I wouldn't expect that to change going forward.

- The team chairs are central office positions that serve the schools, including Bentley. There's been ongoing dialogue about the portion of work that's assigned to the Bentley. Just in the realm of shifting that role and the same is true where we have district-level math coaches. There's a certain portion that's assigned to Bentley, just like we work with the other principals to direct those services to the needs of the school. That's what makes the best sense.
- It just seems to me that you are hearing a form of flexible collaboration. Having watched a lot of organizations, this is very healthy approach.
- One more comment regarding the budget, that net per-pupil allocation came out of a context of the Bentley being a turnaround school. It's not, we're funding a school that's doing really well at the time. We are thinking about funding the school to ensure its sustainability over time. That's the context. We also understand that everyone is committed and want to see the school do well and they also come to this table because they want to see Salem public schools do well. So if we get into a situation where the district is facing a budget shortfall and that's when that dialogue comes in and we don't want to get in the way of other Salem public schools thriving, and Salem students thriving.

19. Why continue the relationship with Blueprint Schools Network?

- I think when we first entered the partnership that we were looking for sort of a fresh start at the Bentley, but we also wanted the validity of having a partner—someone having gone through it, with experience. We really felt like it was really important to have a very strong leader and strong organizational support system for this new school. And so that's where our partnership with Blueprint began. We were very impressed with the framework of the organization and felt like having those really strong principles and support services that could come in, along with a strong leader that could own the development of the staff and student body at the local level, combination is really nice. It's not always what you see. Often, when we think about bringing in an educational management organization to turnaround a school, it is hand over the keys and let them in. And then cross your fingers and hope for the best. So in this relationship, we envision working with Blueprint [Blueprint Schools Network] and Empower [Empower Schools] helping to facilitate that. Having a local leader, who had been successful and lives in Salem, was sort of a really nice combination for us and this year has been about seeing how that works. Next year we anticipate continuing the services we have in place, although the operator status would shift from Blueprint to the Board and having Blueprint in a similar relationship in the sense of the services that the organization provides to the school. The Board would have an MOU with the district and the Board would have an MOU with Blueprint.
- I think as a board member now, strictly out from my Empower role, from what I've heard from Justin [Vernon] and others is that the Blueprint site visits have been very helpful.

That's really comforting to me as a board member. I would love to see some external validation. Having someone else come in and say here's what's going well with the school, here's what folks are struggling with, and here's the plan that we've set up. Because me as a board member and us as a Board, we're not school operators—so we can go into the classroom and see the energy from the kids and we can look at the budget and say it is on track, those kinds of things—but we are not all educators. So, having that external validation of really high quality group, saying here's what is actually going on, not just in the classrooms, but with staff morale and with administration, that's really powerful to help keep the board abreast of what's happening.

20. How would you ensure maintaining the services you would receive from Blueprint, if they were to no longer partner with the school?

- A lot of the initial design elements were certainly a part of what Blueprint has done. I don't think those are unique to Blueprint, I think we're seeing them as best practices in schools across the country. So I'm not sure that we could have gotten here without Blueprint, but I think we would be able to find someone else to provide those types of services.
- I will add that we, [Blueprint Schools Network], are excited where the school is now and where it is headed. We are super excited about the proposal. It does integrate and we don't have to call out the five strategies that we are going to use because there are more. But they are clear and what has us exciting today, and from day 1, is that we had to do a lot of thinking. This was brand new for us this year and we had to confidence as a new non-profit that this was going to have some success. I think we were very clear with the partnership with the district and problem solving approach, the transparency about where the school is. I think from our perspective it took a while for the MOU to get written and get all the parties together. From our perspective that has been lived up to in terms of working through whatever challenges in terms of the school operations.
- I would also add to say that moving forward in this fashion allows us to do two things. It is really pretty interesting. One is, by having the operation under a board of trustees, it allows for the operation to have much more local control. These are our proposed board members, are members of the Salem community and surrounding area, and have a vested interest. I'm not saying that Blueprint doesn't, but as someone who has had the experience of living and working in his own community, it raises one's own investment. So I think that's a powerful thing. The other thing is, is in a context of a lot of change, bringing and retaining Blueprint as a partner is helpful for continuity's sake. We've seen, and maybe Ms. Afonso can speak to this a little bit, we've had a lot of success so far. It's not time to spike the football, so to say. But we've had some early indicators that are exciting around math and ELA. I think in part that's due to the Blueprint Math Fellows.
- Definitely. So we currently have two Blueprint Math Fellows that service our fourth grade students. Each one of them gets individualized, small group tutoring for 45 minutes a day. We've been really able to leverage that as well to help increase our math proficiency rates across the board. They use the Scholastic Math Inventory with our student there as well as in class assessment. We have the flexibility as well; I'm the Blueprint coordinator for our school. So our fellows work very closely with the 4th grade

teacher and are part of all the planning teams and also get PD themselves from us and Blueprint.

21. What evidence do you have that current implementation of the Bentley 3-5 is successful?

- I'll talk about the more qualitative data. So part of what we did over the summer was really designed to our behavior management system, our core values, so the staff members came together over the summer and actually did a multi-modal presentation to think about our core values. What made sense for us and our students. Really push them to achieve our mission of getting to college and graduating from college. Just the changes that we implemented right away, uniforms, which had a huge success. We have hardly any behavioral issues with our behavioral system. So we have a Bentley Bucks system and parents and teachers can use it online, and then the parents get a weekly report about how the students are doing both behaviorally and academically. We've been able to implement thing really quickly. The parents have said they really enjoy it and that students are really excited about the Bentley Bucks. So all students in the Blueprint site visits, this comes up often in the focus groups, they talk about the core values and they always talk about their Bentley Buck and becoming a Roostar, which is when you have a perfect week. So, just those qualitative changes that have already happened in terms of student culture.
- I can speak as a parent, thank God for uniforms. She gets up in the morning; she is ready to focus on school. But I wanted talk a little bit about the other things that my daughter has benefited from. My daughter is a Saturday Scholar and she loves it. She loves learning and going to school. Actually just moved from a different school district where she did not enjoy going. This is the first time where she is actually talking about her future and going to college and about all the fun stuff she's learning. She loves her Bentley Bucks. I love them because I got to sign off on them and I get to see what she did for that week. How was her class? Did she finish all of her homework? As a parent, I feel like the teachers are communicating with me and I can communicate with them. I have never felt that teachers wanted to communicate with me before.
- I can speak on the external; we've talked about everything that's going on in school. As Marie [Belony] said, the communication piece is extremely important to us. Not only our teachers constantly communicating with parents if there's a concern or student issue, be it phone calls, but there's also a weekly newsletter that goes out that I create for families and that is informing parents of what's going on, programming, successes are highlighted in our newsletter. Also our home visits program has been extremely successful, 50% to date. Our families have embraced that program. It really offers an opportunity for students and families to engage in a conversation not in a traditional classroom setting—they are in their homes, somewhere in the community where they are comfortable. I think that's been extremely successful. In addition to our community partnerships, we've had great success with our partnerships—the ELS foundation, the Latin Leadership Coalition, the Salem Education Foundation. The programming that's happened with some of our community partners has been amazing. Part of our Bentley Bucks is students earn their 92 Bentley Bucks, they are able to participate in Friday Choice Time. So we offer a

variety of programs. Currently I have Greg Coles, who is a Latin professional dancer, come in on Fridays and is preparing our 3rd grade students for Latin performance. They are practicing the meringue—they love it. It really does encourage the students to participate in different programming and work towards earning something. Culturally, it's exposing them to so much different things. It really is great. The family partnership piece is needed. I think having someone to solely focus on that and to focus on the attendance piece, and focus on the community partnership piece is needed. It really has allowed me to bring many community members into the school to work with our kids.

- Just to build on something Brenda [Pena] said, talking about students are really invested in earning those 92 Bentley Bucks, getting to choice time, having these options. But I also consider a marker of success the way the students who have not earned the 92 [Bentley Bucks] go to reflection, which is an opportunity for students to sit down with the teacher, reflect through the week, go through their Bentley Bucks, kind of see what was the thing that landed them in reflection that week. And seeing the students work hard to reflect to make action plans and to make a plan to better the next week. It's not a system where kids are feeling brought down if they're not achieving. And I think that's a huge marker of success that students walk out of that door of reflection with a smile on their face, with a plan in their hand ready to go on to the next week.
- And that information also goes home to the parents. So they are able to review it with their child and discuss the expectations and review behaviors. I do think it's been a huge success in our school and as a result, there's been hardly any discipline issues and concerns related to that. It is a universal system, there's consensus across the board, we are all using it and the expectations are there. Every student knows the expectations.
- I think it has helped us to build culture among the students. There's been a real sense of support. It's a pretty transparent system, everybody sees how it works. So students who may be struggling, I think it helps other students to step up and show the empathetic piece—we are all going to work on this together and I'm here to help you. So I think, hitting on a number of different levels, it's been a super successful piece.
- I had the opportunity to go a visit the Bentley school and it was the first time that I had gone there since my two little sisters attended the school. One of the things that popped out at me was the engagement between the teacher and the students. The peers were encouraging as well. It's creating a sense of community that ultimately brings out success.

22. Tell us about the consistency of implementation of your discipline system and any challenges or examples of students who have not been able to respond to the discipline strategies or supports that have been put in place for those students.

- With part of the reflection piece, if a child is a repeat offender we start to think about what is it that we are doing that is effecting them and then we make individualized plans as needed for those students. Brenda [Pena] is involved in those planning meetings as well to make individualized plans for students who struggle with the discipline system for any number of reasons. The ultimate goal is getting them to be successful on their own plans and then eventually within the regular system.

23. Is a student excluded from the enrichment time who is struggling with behavioral expectations?

- So Friday choice time is one way in which we enrich our students, we also have town hall, which is open to everyone and every student. We have special events, we have special speakers come in and talk, as well as other special events open to all students. Choice time just happens to be tied to our dollar system, but if a student is on their own individual plan, they can earn choice time. By another metric, not the standard metric.
- I have a student that is on an individualized plan, in addition to Kickboard, and he is able to earn 20 minutes of free choice time a day, based off of his IEP and his current plan and his challenges. We do make things very realistic and reachable. It's all individualized plans, so based off a student need I will assess that, I will look at their IEP, I will review their service grid and I will the expectations on the IEP, and then I will create a customized plan individually for that particular student. Every teacher is then on board with that as well.
- This is not just reserved for students on IEPs. For every student that needs it.
- We really want to scaffold based on the individual student. The students are earning the same Bentley Bucks, they are losing the same Bentley Bucks. They are a part of the process for reflection and choice time. But they just have a couple of more supports that the teachers are all in agreement on to help them get there, which has created such an inclusive environment in the classroom. No one else in the classroom knows who's on an individualized behavior plan. It can kind of operate as seamlessly as possible. To your earlier point about how we can make this consistent, there are specific common planning time that we devote as a grade level and occasional at a whole school PD, where we go through and look through the Kickboard and look at trends, create action plans with the data.

24. Tell us about the nature of the relationship with Empower Schools, and how the relationship would change if the proposed school is chartered.

- I think the relationship with Empower schools has gone through several different versions. At the very beginning we were design partner. As an organization, we were very active in helping the district figure out a path that would address their needs. So they presented us with a problem and we presented them with a solution for that problem. Then in doing so, we actively helped negotiate the MOU. We helped decide on that \$10,500 tuition figure. We helped to bring in Blueprint. So we were very active in that initial role. And then over the summer provided some technical assistance to both Blueprint and to Justin [Vernon] as the 3-5 school was up and running, because they were working on a really short timeline. After that, the Empower schools stepped away from being a catalyst and to more of support role. So we were there for Justin [Vernon], for Blueprint, for the district, if we were called upon to do something, as also indicated in the MOU, we were responsible for putting together the Horace Mann application. Since then, have moved into this board member role. Like the school committee role, it's not a role that would serve on the Board forever, but we thought that in the short term, it made a lot of sense to have that original partner that kind of brokered this deal, this communication

effort between the district and the school, there on the board—at least for a short time moving forward. That will be the extent of any involvement that Empower has moving forward. We won't be providing any sort of service to the school after this point.

25. Tell us about your vision to coordinate student applications with the district. What efforts have taken place to engage the families of Bentley K-2 and 3-5?

- In our application, we tried to be able to craft an enrollment policy that was based on the theory of opt-out, where all of the kids would go into the lottery who are coming into the district for kindergarten. After analysis of the situation and consultation with [the Department], we are exciting about having an opt-in through the district. So, I'm the chair of the Policies Committee on the [Salem] School Committee. So we are in charge of revisiting the assignment policy and one of the things that we are doing this year is moving up the timeline of enrollment for the school district so that it coincides with Bentley's timeline for the lottery. And so, I think the [Salem] School Committee, certainly 6 out of the 7 of the members, are very enthusiastic about that shift—regardless of how they feel about charter schools, they definitely all embraced the concept of having the most representative population as possible. District applications weren't previously due until May or June. That's the first piece of the puzzle. Now we are going back to designing the enrollment form and what's the process for Kindergarten enrollment, which is a district-wide effort, vs. what role will the district play in supporting Justin [Vernon] and the Bentley, in terms of retaining the K-1-2 population. I think there are pieces of that that have been discussed, one is that the 3-5 Bentley community is very strong in terms of parent involvement and engagement. I would say these representatives and the rest of the school feel very positively about retaining the 3-4 families. So we've talked about what does it look like for the district to partner with Bentley 3-5 in helping support those relationship with K-1-2 and because there's still some tensions between the two bodies and we want to make sure that those students still have the opportunity to stay there. So we've talked about doing an open house and enrollment, perhaps even separately for Bentley K-1-2, in addition to the district-wide kindergarten open house. I think there's a decision about that. I think it's really incumbent upon the district and [Salem] School Committee to reach out to the Bentley K-1-2 and talk about how do we work with those teachers and talk about the greater good of Salem, rather than the tension of their school being taken over. Which is certainly having an effect on those faculty members.
- In regards to the family engagement piece, I have had the opportunity to work with K-2 parents and revitalize the PTO [Parent Teacher Organization]. We had parents across the board, K-5, participate, which has been a work in progress. But successful. We have an elected board. Most of the programming efforts that happen in the 3-5, I am in charge of and I have had the opportunity to collaborate with the K-2 program. So we had our annual food bash that was a K-5 event; our literacy night will be a K-5 program. So again, we are reaching out our K-2 families as well as K-2 staff. There's always ongoing conversations. We make ourselves visible to the K-2 parents to answer any of their questions or concerns. I feel like I have definitely established some positive relationships with our K-2 families. We have collaborated with a lot of events. We have our annual giving tree, which happens during the holidays. That was a K-5 programming. We did

multiple gift drives and that was a K-5 program as well. So we do try to engage them as much as possible and I feel that we do have an open door policy as well. So we've had a lot of K-2 parents come in and sit in the classroom to observe and see what's going on. We also have a lot of siblings. So I feel that there is a lot of ongoing discussion. It's been positive.

26. What evidence do you have that families in Salem will apply to the charter school? What strategies have been implemented to prepare for a potential lottery in March?

- I would say based on the evidence that we have, we have a high level of engagement and satisfaction with our 3-5 families and those 3-5 families are spreading the word. I think there is increasingly a feeling that there will be demand. It may be more challenging this year because we don't have results. What are people looking for? They are looking for MCAS results. We are too, but I think we have the inside story of indicators. Whether its Scholastic or ANet, we can see if the school is really improving. We don't publicize that. But I think there's a shift and people are excited about this change and that the district is committed to improving schools.

27. How do you ensure the proposed school does not evolve to serve exclusively families who are more well-informed about educational options? How do you as a board ensure that the school serves a student population that is reflective of Salem and its diversity?

- I think we put a lot of time and effort into our proposed recruitment plan. One of the benefits that we have this school year is that we are there. We get to begin to build those relationships with those families. We can begin to build the relationship with the district, but also committee partners. So, I feel through staff connections, some of the work that Brenda [Pena] has done, we have strong partnerships. Whether it be through the YMCA, the Boys and Girls Club, the public library or just the connection with the district around the parent engagement center. We have also talked a little bit about the community advisory and also about the Latino Leadership Coalition to make sure we are reaching out to as many avenues as possible. We also have a strong understanding about where our kids come from. A high percentage of our students come from the Point Neighborhood and we know that in going out and doing these home visits. We know exactly where they live, being in that community. We think that all of those relationships are going to help us in the future.
- I can say as a parent, I am new to Salem, my daughter had to go to Bentley. I was not thrilled about that because I knew that Bentley did not have a very good reputation. So I thought she would go to school for a year and then I would beg for a transfer. In the couple months that she has been there, I have seen such an improvement in her math skills and her reading skills and her writing skills that as a parent, I see that my daughter has had a lot of progress in a short amount of time. Just from talking to the parents in the afterschool program, they are very happy to see where Bentley is going this year.
- Our experience in the district has been that once our innovation school started to make some progress—that was a school that had a high population of free and reduced lunch students—now it's the new "it" school and everybody wants to get in there—solid leader,

some success. We hope that the same model will happen at the Bentley. The idea of a universal application makes things a lot less tricky of where you can go to school. There's such an even playing field in terms of the type of school your child will be able to attend. That's the long-term, our goal. But we are very interested in this universal application process. I'd love an opt-out provision, I think it's the best way to do it, but that isn't allowed in the law so we'll figure out what's the most robust process we can have short of that.

- This piece around results is very important. I'm thankful that Salem has become a results focused district and I think that's great. I am going to report out on some Achievement Network results from last year and from this school year. Keep in mind it's not the same identical network of schools, it's somewhere around 110 to 120 schools. But some of those schools are different this year from last year. Keep in mind at this point in time we only have 2 interims as our average, where last year the school had 4 interims. I'll just read off the list. ELA, 3rd grade last year – 5% above the network. This year, 12% above the network. 4th grade ELA, -2% below the network. This year, 11% above the network. 5th grade ELA, even with the network. This year, 4% above the network. Mathematics, last year 3rd grade, -4% below the network. This year, 10% above the network. 4th grade last year, -10% below the network. This year, 11% above the network. 5th grade, -3% below the network. This year, 6% above the network. You also take a look at cohorts. Even in areas where we are continuing to do work and we see as areas of improvement, for example, in 5th grade they struggled last year on the MCAS in particular. We have a 6% increase from last year to this year above the network. 4th graders last year to 5th graders this year. Mathematics, it's a 16 point differential, from last year's 4th graders to this year's 5th graders.

28. What's the retention of students that started at the Bentley this year?

- We did lose some kids through transfers, etc, prior to the school year. But, we have had very strong retention of kids since they've gotten here. Encompassing all the changes that we've had—uniforms, discipline system, level of academic rigor, demand—we've lost very few students. Those kids that we have lost, which is a handful, there have usually been very extreme family situations tied to them.
- And they weren't former Bentley students. We had two kids that recently had to move and they came in new this year, but due to family circumstances and other issues they had to move. But we have retained the majority of our Bentley students.

[Follow-up: Have there been students that have asked to transfer into Bentley this year?]

- That doesn't really happen too often. We had some students leave, unfortunately, that were not convinced about the model, the staff who didn't appreciate this model. But since we have started there hasn't really been much attrition. We have had people recommend the school, but it's been pretty stable.

29. Based on your knowledge of the current Bentley K-5 student population and your proposed promotion standards, what are your expectations for student retention and student attrition in response to retention decisions? Will Salem Public Schools honor your promotion/retention decisions if a student transfers?

- I think that would be a conversation, in particular with Ms. Carbone about our promotion and retention guidelines are. Right now, the way it's written, we are looking for 70% proficiency with respect to standards and we will judge that through our internal assessments connected to the Common Core. We also have a piece connected to the capstone project. We want to do whatever we can to support kids. Extra support would include our Saturday Scholars, really thinking on an individual basis for our WIN block, and then Acceleration Academy. We'll definitely make decisions around retention. But we don't take that lightly. We will be using the retention scale as a guideline to make those decisions and err on the side of heavy support and retention in very few instances.
- I think again, it goes back to collaboration and good communication. But we've also just embarked on a project district-wide in collaboration with the Salem Academy Charter School, the dissemination project that is grounded in standards-based grading and reporting. And I think the more we get normed around that as a district we are going to be on equal footing that we have similar expectations. No one school is driving the expectations; it's whether or not kids meet standards. So I think that's going to be a great benefit. Justin [Vernon] has been very much a part of the project as well as we've gotten that off the ground.

30. [Justin Vernon] Tell us about your experience as the school leader at the Roger Clapp Elementary School and how it provides evidence of your preparedness to be a charter school founder and the proposed school's Executive Director?

- I think it's in part around being able to lead in an urban area with a very similar population. So, when we looked at the demographic statistics for the Roger Clapp Innovation School and the Bentley, they are actually very similar. Percentage of students of English Language Learners, students on IEPs, Free and Reduced Lunch is slightly higher at the Bentley but they are both fairly small schools. And I had the opportunity to found a school through Boston's first innovation school. And really work to build out a plan and learn from some of the programs and strategies that we used there. And then bring other folks into the conversation and build on that idea. So pieces like the Saturday Scholars, such as the WIN block or intervention block, and a constant focus and push around challenge and rigor. That was always a piece at the Roger Clapp, just around ensuring the kids are always being exposed and engaging in rigorous work. I think that my work this year, really puts me in an advantageous position to be the head of school next year because I have had a chance to work with some of the same families that we'd be working with next year. We've been able to try many of the same programs that we've put in place. We also get an opportunity to see which programs need to be changed or tweaked next year as well. It's been very beneficial for me too, to be in Salem and learn how the district works—just from an organizational functionality perspective. How does the budget work? How do safety plans work? Those types of things. I think all of those

things are going to be helpful in helping us think of how we are going to make things even better for next school year.

31. [Board] Why is Mr. Vernon your choice for the position of Executive Director? How will the proposed board approach their duty of supervising the school leader, evaluating their performance, and decision related to their employment contract, including termination?

- We talked the Massachusetts Educator Evaluation Framework. Really talking about, with Justin [Vernon], as we enter next year how the school is doing, how are the students doing, what are his big goals moving forward for his own development. And then setting goals for the school that coincide with the Accountability Plan goals. So that we are really looking at the same things across the board, what is going on at the school, what is Justin [Vernon] shooting for, and what are going to be seeing at our quarterly or monthly reports back so that we can monitor that. I think that is the general framework. We will have a human resources committee on the board and will participate in the evaluation process. There will be a specific committee that will look at his performance towards his goals throughout the year. We'll do some sort of a 360 evaluation, so that we are not just swooping in the last day of school and seeing how he's done. But really have that be an ongoing conversation.
- I also think that parent and teacher surveys are going to be very important as well. Obviously the teachers need the support and the parents need to feel that he's doing a great job. But we will definitely have to watch that and assess that.

Governance & Finance:

32. [Board] What do you consider the most important job of a charter school trustee and why?

- I think it's upholding our charter. Making sure that the goals that we set out in that charter are being lived up to and we are upholding them. Those core values that are within the application are very important things. And also the finances, we are the fiduciaries of the institution and we need make sure that our finances are in line. That we have a strategy to achieve those goals. Evaluating and self-reflecting where we are at and how to go forward. It starts in some respects with making sure we have a good Executive Director who's going to lead the staff and make sure there's a culture of excellence.
- At the end of the day, it's all about the students. Are they performing, are we seeing an increase, are we making a difference, do we have the right things in place to make it all happen. Not losing sight. We want to see these students have these opportunities and improve academically for personal success.
- There's also an important piece, what if the district comes back next year and says we can't do \$10,500 next year, it's the responsibility of the Board to be that buffer of what's happening at the school and the negotiations and the decisions that have to happen at a systems-level. So it doesn't put Justin [Vernon] or any of the teachers or administrators in a position that possibly compromises the relationships that they've built and the

operations that they use on a daily basis to actually get what's needed for the kids on the ground. So hopefully it will never come to that and it doesn't look like it will because the relationship so far has been really strong and really positive. But if it were, that's a key role that the Board has to play to provide that buffer to the school.

33. Have board officers been identified?

- I've had some discussions about the treasurer role.
- I've expressed some interest in the committees that I'd like to participate in.

34. Provide an example of decision you would make as a board, particularly a decision that would require you to vote as a board.

- There are not a lot of instances that require a vote. There's a lot of discussion of overall policy level. A contract to rehire Justin [Vernon] the following year is a conversation that would be held and a vote would be required. I think that the budget has to be approved every year and a vote would be required. If one of the benchmarks isn't being met, we don't go and vote that we are not happy that the benchmark isn't being met. We would be upset, but that's not a voting area.
- Financial policy and bylaws would be an example of a policy document requiring our approval. Our audit.
- Blueprint contract would require a vote because this is getting at the overall and the details. It would be inefficient and a terrible use of resources to drill down into the number of pencils that needed to be purchased this year. That's not my job. But something on the organizational, 20,000 feet, as to organizational effectiveness, Blueprint comes into play. That's the province of the Board to make that decision.
- You are going to see line items in the budget. If we didn't see line items in the budget and what is being purchased or potentially requiring a vote, I will see deviations in the budget. The development of some of this is organic. If the contract is signed, it will show up in the budget. The budget has to be very carefully analyzed frequently, and at that point, for me, raise a flag.

35. How was the budget and cash flow projection developed? What resources were used to develop the budget? To what extent did members of the proposed board review the budget prior to its submission?

- The budget, before the Horace Mann application was due, Marlena [Afonso], Justin [Vernon], and I with help from some other folks put together several years projection budget based on the numbers that they were looking at for this current school year. Spent a lot of time on that thinking about teacher ratios and where the money should be focused and what would be spent where. Those kinds of things. Because that work had already been done, not the application budget that was provided to ESE, but with many of the same line items, I was responsible for making the two year projections and then working

with Justin [Vernon] and Marlana [Afonso] to confirm that that was actually going to look like. The cash flow projections were also done by me, based on what's already been spent this year and that outflow and projecting it forward.

- The same review process that would have happened. It was submitted to the board and other stakeholders as the full application.
- We went through and sat with Sarah [Toce] and Justin [Vernon] and Angel [Donahue-Rodriguez] as well, and we went line item by line item. I looked at the projections and I checked the math. I was satisfied with how things were there and kind of made sense of how it was built. We had that ability to discuss with them. Understanding that it was built on an existing budget. As we go forward we will review it as it comes.
- I would agree with what he said. We went line by line and got thorough explanations about what was the rationale going on behind every single line item. And then on top of that I asked my own questions about how particular line items worked. I was very satisfied with those things.

36. The application did not provide a budget and cash flow projection narrative. Tell us about the assumptions made in estimating expenses for the first year of operation. What is the \$40K 'rollover' recorded in July 2016 as revenue to offset the salaries of administrators during that month?

- Looking at July fiscal year 2016 that is based on a conversation I had with the district business manager and we talked about having any funds that were left over from this year, surplus, and will rollover into an account for the Horace Mann for next year.

37. How does the budget reflect the costs of the variety of assessments? Is ANet through the district and not a school expense?

- That is what is happening this year and that is the assumption that we are working under for next year.
- When the budget was being built there were things put in to make sure that if any changes were to take place, there would be coverage for that essentially.
- One thing to keep in mind, a lot these expenditures move because of the redesign grant. But short for that grant being extended, we will definitely have to have some conversations around how we will pay for some of those things. Because some of the Bentley expenditures are current three-year cycle and are funded with the grant.
- The \$60,000 funding is a combination of Title I and other things.

38. What do you currently have at the Bentley for technology? What are the expectations of keeping that technology and perhaps the expense of adding additional technology to the program you propose?

- Currently we have smart boards in all the classrooms. We have a separate computer lab as well. We have an iPad dock. This \$15,000 here would be an effort to expand that. Another iPad dock or another laptop cart. We think that is a reasonable price to fit that bill.

39. What fiscal controls and financial management policies will you use to remain informed of the school's financial position?

- We would want to have regular updates of what the plans are of the school. We'd want to make sure what's being talked about is being included in the budget. So we could pull that out and at board meetings get regular feedback from Justin [Vernon] and his team to make sure we are aware. And if that doesn't fit we need to discuss how we are going to fund it. Just having regular communication.
- The entire board may not be aware of this, because we haven't been in this task, is that we do have a municipal accounting system with our Horace Mann, they get their year to date reports, so they can have a good tally of where things stand. Because [the district] will use that as a general accounting system.
- Financial statements, certainly at least quarterly, but monthly looking at the projection to actual comparisons. Something to talk about why they look the way they do.
- I had a board at the Enterprise Center and my view is that the budget is a management tool. The budget allows you and mandates these kinds of conversations. It's a question about being able to ask and thoroughly understand the answers to the questions and have the report out monthly.
- I think there is a conversation that has to take place long before the end of this year with Justin [Vernon]. If the school gets the charter, the board becomes the operator of the school. I think there's a conversation that has to take place between Justin [Vernon], Marlena [Afonso], and the Board to understand what's working with the situation right now with using municipal, with going through city and district procurement and figure out what the best next step is. I'm not close enough, at one point I was, but at this point we can try to find some workarounds, maybe it's working; maybe it isn't. We have to find the right balance of exerting the autonomy that the Horace Mann has. And maybe for of that responsibility does stay with the district and maybe some of that we take on our own. I don't think we've made that final decision yet.

Academic Program:

40. Describe the status of curriculum for grades 3-5 – both development and implementation. Has a standard practice of review and improvement of curriculum been implemented? Tell us about the practice thus far this year.

- All teachers, in the summer, began the development of our year one trajectory based on units, which were based on standards that would need to be taught. Those are all in a single place where anyone can see them. Those are reviewed by the administrators. Then, on a weekly basis, we are preparing lesson plans. We have two deadlines for the upcoming week.
- We have a fair amount of systems in place, both for creating the curriculum, for receiving feedback on the curriculum, and then adapting the curriculum to fit whatever needs come up. So we start with our long-term plan, which we've collaborated with our co-teachers. We used the district curriculum map to give us a sense of where we needed to go and how much time we needed to get there. Then that's broken down into unit plans, which are submitted to our administrators Justin [Vernon] and Marlena [Afonso], far ahead of time before we start our unit. With those, it's a unit plan with a trajectory for what we plan to teach. Also, our end of unit assessment. Any data points that we feel are relevant with standards that we already taught—this is where we did well. We built in a reflection to have a last minute WIN before moving into the next unit. Then we get down into daily lesson plans. So those are created with our co-teacher. So I have an ELL specialist with me and we talk through every lesson plan, we take it from the unit plan and we break it down into the daily lesson plan with any differentiation or accommodations that need to be made for considerations for our students. Once that whole process has played out, so we sought feedback on our unit plans from our administrators, we received feedback on our daily lesson plans from our administrators, once we've taught the lesson, then we take time to reflect. We use our exit tickets, the assessment, from each day, having put that into Kickboard. It's connected to a standard, so we are able to use all of this data, the ANet data, Whatever I Need block data, and where students are in working on particular standards in math. All of that will come into play and we create something the data action plan, where we use all of the data that we have. We look for breakdowns in understanding on the student level. We make plans to re-teach and reassess and we kind of go through the process again. Sp the curriculum is regularly adapting—it's changing. It's flexible if, for example, our plan was to move forward with unit 4 on poetry, but our students on their assessment for our non-fiction unit were really still struggling on certain standards. So we have the opportunity to schedule in an additional week of reassessments based on our re-teaching based on our data.

41. Can you describe the professional development you receive during the summer, prior to the implementation of the systems you just described?

- It was valuable, I think on many levels. One, some of had spent some time in the summer together crafting the cultural aspects of what we hoped to put into place at the Bentley 3-5. But these, two weeks in the summer were the opportunity for this entire staff that had been put together to find out what our strengths were. We created our own human capital map of how we worked, how we would collaborate, and each day was very strategically

organized for us to be able to address all of the different components and challenges that we were going to be facing with the students coming. So, we worked on collaborative activities, we looked at the data that we had so far of these students and developed what we thought were standards that were, as we called them, our power standards. They weren't going to be to the exclusion of all standards, but what we thought was as already identified areas of weakness for students. We had people from the district coming in to work with us, to explain how the technology worked, how our special education program was working, our ELL program. So all of those days were strategically planned for us to be able to cover, in a relatively short amount of time, and to really begin to understand and further embrace what the vision and mission of the school really was. It was an invaluable two weeks.

42. Are the classrooms currently co-taught at the Bentley 3-5?

- They are co-taught at different times.

43. What does this look like in action? Tell us about the successes and challenges of this aspect of the program.

- One of the challenges that we faced at the beginning of this year was time. And making sure that they were getting enough time for teachers to plan effectively together to be able to deliver instruction, either simultaneously or collaboratively—depending on which model of co-teaching we chose to use that day. So we actually a schedule change. We changed our dismissal schedule in order to allow some more flexibility for planning time. We hope to, actually in our charter application, building in more of that planning time because we found that to be so helpful and such a challenge.
- If I could speak to the opportunities, it is very cool to walk into a room and see some blurred lines between who's the lead teacher, who's the ESL support person. I think it's also excellent to see three or four adults in a classroom sometimes. That's exactly what we do see. So, one of the examples that I can utilize is in math class—we might have three adults in a classroom at the same time, one being the lead math/science teacher, the other being the individual help supporting students with IEPs, and then the other teacher supporting students that have an ELD level. We can have three potential groups where after the mini-lesson, the lead teacher is working with a small group of kids, there's some students doing some independent practice on that day's content, where maybe one or two of the interventionists are checking for understanding, and then at the back table there's a small group where we are going back to a standard where we didn't fully grasp the day before.

44. Describe the weekly walkthroughs performed by school leadership and Blueprint. How have the weekly walkthroughs supported effective instruction? In addition, please describe the Professional Teams. Describe specific action plans and outcomes seen as a result of this practice.

- I think for us, one of the things that we try to do is hone in on our weekly administrative walkthroughs around data points that may have come up somewhere else. So if we have something that comes up in a Blueprint monitoring site visit around more consistent checking for understanding we'll use a modified monitoring site visit from the State and put a big emphasis around checking for understanding and elaborate on that for the staff member. So then that sheet, once it's completed and filled out, will go to the staff member and they'll get that individualized feedback and may become a part of their 1-on-1 meeting later that week. Then we will also disseminate the results to all staff members at a common planning time meeting. We are also able to make some decisions based on what we see happening. For us, it doesn't always lead somewhere next, it's an additional data point. Like we discussed in one of the Blueprint site visits that we were kind of shocked by the things that came up, because it wasn't validated by one of our internal walks, so that led to a conversation. Otherwise, it's led to some concrete PD. So, one of the things that we have been working on all year through the ILT [Instructional Leadership Team] and then leading work in professional development has been around open response writing and also ensuring that kids have access to complex tests. So we married that idea with some of the feedback we were getting from a Blueprint site visit around clearer differentiation and we partnered with the district to bring someone in from Landmark to provide professional development during a common planning time session for teachers. Specifically around graphic organizers to assist kids in clarity of their open responses.
- In between the site visits, we have five site visits every year, about 5 to 6 weeks in between each one. We also have a member of the Blueprint team meet with Justin [Vernon] as the Leadership Team every week—a former COO at BPS [Chief Operating Officer at Boston Public Schools]. So it's not just figuring out what needs to be done, but what's the follow through on an action item. I think one thing that we've seen over time, again, is this emphasis on systems. So there's the startup phases, which is great because some folks are really built for that, but in terms of sustainability, how to build in systems over time. A lot of the feedback we are getting on our site visits and talking with teachers and students are the systems—feedback and observation. This is not just teacher professional development. People feel very supported through these systems and we hear the same thing from students. We feel like they are being pushed to excel. Again, this comes back to the systems that we've heard about today about holding kids to a different level of standard for academic learning. But that is something that will continue if this were to get approved and we look forward to continuing.

45. What is the expectation of current Bentley 3-5 faculty and staff remaining at the school for next year if chartered?

- There's no assumption that there would be any change. The current staff members will go through the Mass Evaluation process and will judge, based on that, if they'll return next

year. But it's not a wholesale, you have to apply for your job; that's not the approach that we are taking from this year into next year for the 3-5.

46. Tell us about the planning and preparations in place to successfully recruit faculty and staff for the Bentley K-2.

- We've put a number of things in place already. We've talked to K-2 staff frequently, myself and through the principal of the K-2, to have an open door policy for folks to come up. We'll be working through the Superintendent's office and also through the union to lay out a timeline to get folks that are interested in wanting to come on board with what we think about student achievement and our mission and vision to apply and be a part of our team.