

**SMITH LEADERSHIP ACADEMY
CHARTER PUBLIC SCHOOL
Dorchester, MA**



2003-2004 ANNUAL REPORT

“Inspired by one woman, carried out by a community”

Charter School Information Sheet

Charter School Name Smith Leadership Academy Charter Public School

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School Location Dorchester, MA 02122

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ONE SCHOOL, ONE MISSION

Our mission is to develop high-achieving students of good character who use problem solving, communication, and interpersonal skills to inspire others and to catalyze educational, economic, and political advancement within their communities and the broader nation.

SEVEN CORE VALUES

THOUGHT LEADERSHIP

Creative problem solving, innovative thinking

PERSONAL EXCELLENCE

Doing your best at everything you do

INTELLECTUAL CURIOSITY

Insightful questioning, the desire to learn and know

INTEGRITY

Reliability, honesty with yourself and with others

COMPASSION

Sympathy and empathy for others

COMMUNITY CITIZENSHIP

Acting to improve your community

RESPECT

Treating others as you would like to be treated

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Smith Leadership Academy
Charter Public School

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July 30, 2004

Dear Friends of Smith Leadership Academy Charter Public School:

On behalf of the Board of Trustees, I am delighted to submit the first Annual Report for Smith Leadership Academy Charter Public School. Our inaugural year was filled with accomplishments that are described below.

The school's sixth graders were pioneers. For example, they were the first to memorize and promulgate the school's mission statement and core values, and the first to test drive our uniforms, the first to help establish the school's culture of high standards and good character. They are, in a word, leaders.

The teachers and staff deserve special thanks and appreciation for their dedication and commitment. Longer school days and Saturday sessions at Smith Leadership Academy required an extraordinary commitment of time and energy by teachers and staff. On top of this, the faculty and staff were faced with the challenges of opening a new school. They handled this first year with humor and grace.

I also want to acknowledge Thomas Smith, the founder and principal of Smith Leadership Academy, for his clear vision, extraordinary dedication and consistent leadership during our first year.

The parents, who entrusted their children to us, were supportive and helpful throughout this first year. The recently formed Parent Leadership Team promises to be an important force in the future of the school. During the parent interviews that the Trustees conducted as part of our end-of-year evaluation, we learned that the parents were exceptionally pleased by the effect of the school on their children and were committed to participating in their children's education. As one clear measure of success, virtually every parent is sending his or her child back to the Academy.

Finally, let me thank my fellow Trustees for their generous contributions and to Smith Leadership Academy. In closing, we look forward to the coming year, when we will double the student body of the school, and a bright and shining future for the school and all of its students.

Sincerely,

William L. Lahey, Chairperson

EXECUTIVE SUMMARY

Smith Leadership Academy is a 6th – 8th grade college preparatory middle school in Boston. Our mission is to develop high-achieving students of good character who use problem solving, communication, and interpersonal skills to inspire others and to catalyze educational, economic, and political advancement within their communities and the broader nation. Our core values are thought leadership, personal excellence, intellectual curiosity, integrity, compassion, respect, and community citizenship.

Our mission addresses the educational needs of Boston. While Boston's 21st century schools are much different than their predecessors, many historical problems persist, including troubling education gaps between the wealthy and the poor. The founders of Smith Leadership Academy are concerned with these issues and their implications for the future. We plan to address these problems by providing quality education to inner-city youth. Our plan for educational excellence has five key components: 1) focus on achievement in core academic subjects; 2) cultivation of students' character and leadership ability; 3) a supportive, orderly learning environment; 4) strong parent involvement; and 5) partnerships with community organizations and other schools.

At the Academy, inner-city students who have been traditionally marginalized by the educational system will undergo transformational educational and personal experiences that enable them to soar to new heights of achievement. Our academic culture will be characterized by a rigorous curriculum and high standards. Students will develop solid academic content knowledge and distinctive interdisciplinary skills in problem solving, communications, self-management, and teamwork. Students will receive extended instruction time in core subjects as well as tutoring or enrichment. In addition, all students will accelerate their learning by attending summer institutes that reinforce and build upon core curriculum concepts learned during the regular school year.

Smith Leadership Academy students will do more than learn: They will LEAD. Students' learning will become meaningful as they apply their content knowledge and skills to act on and resolve "real world" issues. We will cultivate students' leadership potential in three primary ways: 1) linking classroom instruction with service-learning projects; 2) engaging students in ethics courses that help them identify, understand, and appreciate the principles of morality and acceptable conduct; and 3) educating students in dispute resolution and consensus building to lay the foundation for responsible community and national citizenship.

Our school community will be safe, orderly, supportive, and focused on academics. At a school-wide level, student behavior will be governed by a code of conduct that emphasizes self-respect as well as respect for others. At an individual level, each student will be assigned a Homeroom Teacher, who will closely monitor and support his academic and personal development.

Educators at the Academy recognize that parents are the primary educators of their children and believe that parent involvement is a key factor in increasing student achievement. Key expectations will be defined in a parent-school contract and will include maintaining consistent dialogue with teachers and attending a series of workshops focused on ways that parents can support the development and achievement of their children. Parent involvement in academy activities will be supported by the Parent Leadership Team. The Academy will also reach out to the broader community by forming strategic partnerships and working relationships with other schools,

community-based organizations, universities, and businesses to initiate and maintain the sharing of best practices, comprehensive after-school offerings, apprenticeships, and internships.

After leaving the Academy, our graduates will be prepared to enter and excel in a college preparatory high school. We would like to see all of our graduates earn a scholarship to a top-notch private high school or attend one of Boston's prestigious exam schools, such as Boston Latin. However, regardless of their choice, we will support them in realizing their visions.

ACCOUNTABILITY PLAN

SUMMARY OF PERFORMANCE RELATIVE TO ACCOUNTABILITY PLAN OBJECTIVES

¶ In our inaugural year, we have steadfastly worked toward achieving the objectives set forth by our accountability plan. Recognizing the importance of empirical proof as a measure for progress, our accountability plan is tied to well-respected measurement instruments, such as the MCAS and the Stanford 9. We also use local instruments, such as stakeholder surveys. At the time of writing this annual report, our testing data and surveys are still in process. We, however, look forward to sharing the results with all stakeholders in the near future.

Accountability for Academic Success

- ¶ Our students will demonstrate solid academic content knowledge and skills in core curriculum subjects (i.e. math, language arts, science, and social studies)
- Our students' performance on external assessments will consistently improve or remain strong
 - Smith Leadership Academy's aggregate student scores on the English MCAS will outperform the Boston and State averages
 - Smith Leadership Academy's aggregate student scores on the Math MCAS will outperform the Boston averages
 - 100% of students will improve 1 or more grade equivalencies annually on the Stanford 9 test
 - Our students' performance on internal assessments will consistently improve or remain strong
 - 100% of graduates will pass their core academic subjects with an average of 70 or higher, in accordance with the Academy's graduation policy
 - Graduation by Exhibition: 100% of students will present a graduation portfolio of their work to a review panel composed of students, educators, parents and other community members. These graduation portfolios will exhibit the skills and knowledge students have gained during their time at the Academy. The graduation portfolio will include: cover letter, science experiment, math project, literary essay, public policy action thesis, and an oral presentation.
 - Our curriculum will be based on high academic standards for content and performance
 - Subject Specific Performance Standards: The Academy will use Massachusetts's Curriculum Frameworks as a basis for creating Smith Leadership Academy performance standards for all core curriculum classes. Teachers will create rubrics that clearly describe and differentiate levels of mastery in performance.
- ¶ Our students will develop awareness, understanding, and appreciation Smith Leadership Academy's 7 core values and the ethics of others cultures
- 100% of students will be graded for the demonstration of our 7 core values by their homeroom teachers each trimester

- 100% of graduates will complete 3 years of Ethics coursework and pass a minimum of 2 Ethics courses at a 70% level of proficiency
- 100% of students will maintain and submit annual Ethics journals documenting their own ethical beliefs/positions as well as their perceptions of others ethics
- 100% of students will interview someone from a culture or religion other than their own and demonstrate understanding of their persons ethics in front of a panel of educators, parents, and community members

¶ Our students will develop the interpersonal skills to build and maintain strong relationships within Smith Leadership Academy and throughout the broader community

- 100% of graduates will complete 3 years of Leadership & Service (service learning) coursework and pass a minimum of 2 Leadership & Service courses at a 70% level of proficiency
- 100% of students will be graded for the demonstration of our 7 core values, including community citizenship, by their homeroom teachers each trimester
- 100% of students will be able to identify at least one person they view as a mentor within the Smith Leadership Academy community
- 100% of students maintain involvement in at least one community based organization in the Greater Boston Area

¶ Our students will catalyze the educational, economic, and political advancement within their communities and the broader nation

- 100% of graduates will produce an 8th grade thesis on a public policy problem, provide recommendations for solving it, and take action toward implementing their recommendations
- 100% of students will participate in Leadership & Service Seminars and community service programs with community based organizations and businesses

Accountability for Organizational Viability

¶ Our key stakeholders(i.e. governance, staff, parents, and students) will know, understand, and embrace our mission, purposes and academic program

- 100% Smith Leadership Academy trustees, staff, and students, and parents will be able to recite and/or paraphrase the school mission
- 100% of all parents, teachers, students, and trustees will sign an oath which explains the Academy's core expectations of them
- 100% of key constituents shall have the opportunity to be involved in Smith Leadership Academy events or forums
- 100% of incoming parents/guardians shall be offered the opportunity to participate in a parent orientation prior to the beginning of their child's attendance at the Academy. At least 90% will attend in person.

¶ Our organizational structure, roles, and responsibilities will be clear and appropriate for achieving the programmatic goals of our Charter

- The Academy will be governed by a 9-13 member Board of Trustees.
- The Board will represent diverse professional backgrounds and a common commitment to education and community development. Trustees will have professional experience and skills in strategic planning, development, finance and accounting, law, real estate, marketing, human resources, and education.
- The Board will have a minimum of 3 standing committees including the Trusteeship Committee, the Finance Committee, and the Development Committee.
- The Principal, the chief executive officer of Smith Leadership Academy, will be responsible for general management of the educational and business operations of the Academy. He will report directly to the Board and lead the day-to-day implementation of the Academy's educational program.
- The Instruction Leader will focus on achieving excellence in curriculum and instruction.
- The Business Manager will specialize on achieving excellence in the operational and financial aspects of the Academy.

- ¶ Our academic program will exceed or meet the expectations of our key constituents
 - 90% of parents/guardians shall attend report card night or an individual teacher meeting each trimester to discuss their child's academic progress
 - 90% of parents/guardians shall agree that the school is proactive in seeking their involvement in their child's education
 - Parent participation in the Academy forums, events, and Saturday programs shall increase annually

- ¶ We will Attract, develop, excite, and retain talented administrators, teachers, and trustees
 - 100% of teachers, administrators, and trustees shall annually be able to identify a project in which they played a leadership role
 - 100% of teachers, administrators, and trustees will participate in their own professional development by identifying personal development needs and proactively designing plans to address them
 - 90% or more of annual teacher, administrator, and trustee surveys shall reveal that they are "very satisfied" or "satisfied" with their personal professional development program
 - The supply of qualified applicants shall consistently exceed demand for available teaching, administration, and trustee positions
 - The teacher and administration retention rate will consistently exceed or equal the average of all other Boston charter schools

- ¶ We will establish and maintain financial stability
 - Annual independent external audits shall be successful and reveal that the Academy's published reports accurately reflect its the operating results and financial condition
 - In all years of operation, excluding its first year, the Academy shall maintain a contingency that is greater than or equal to 1.0% of total per pupil tuition revenue
 - The Academy will secure a bank sponsored line of credit that exceeds or equals 50 percent of its per pupil tuition
 - The Board shall conduct a capital campaign to prepare the Academy for the acquisition of a permanent facility

- Led by Board of Trustees, the Academy shall annually rank among the top half of Boston charter schools in terms of fundraising
- ¶ We will secure long term facility that is appropriate for the Academy's educational program
- By the conclusion of its second operational year, the Academy will secure a facility lease with a term that matches the duration of our charter
 - Our facility will have sufficient classrooms and other educational space for the Academy's educational program
 - Our facility will be safe as affirmed by a survey of the Academy's core stakeholders
 - Our facility will also meet the Academy's general standards for cleanliness

Accountability for Faithfulness to the Charter

- ¶ We will achieve or demonstrate increasing promise of achieving the mission, purposes, and programmatic goals set out in the Charter
- We will empirically and qualitatively demonstrate progress toward achieving the mission, purposes, and programmatic goals set out in the Charter
 - We will maintain a curriculum, program, and activities that are consistent with the spirit of the Charter and with all legal and regulatory requirements (e.g. extended day, extended year, single sex math and science classes, leadership program courses, community circle)
 - Provide solid rationale and justification for deviations from the Charter or differences in implementation

SCHOOL PROFILE

GRADES AND AGE LEVELS TO BE SERVED

School Year	Grade Levels	Ages (generally)	Total Student Enrollment
2003-2004	6 th	11 - 12	88
2004-2005	6 th -7 th	11 - 13	174
2005-2006	6 th -8 th	11 - 14	216
2006-2007	6 th -8 th	11 - 14	216
2007-2008	6 th -8 th	11 - 14	216

SUMMARY OF EDUCATIONAL PHILOSOPHY

While we do not subscribe to one particular educational theory (e.g. Comer, Sizer, Hirsch), educators at the Academy will share several core beliefs that are grounded in practices that have proven to be effective:

- ¶ *Students have diverse learning styles and favor different modalities for learning.* We use a range of teaching strategies that cater to all modalities: visual learners will benefit from diagrams, illustrations, overhead transparencies, videos, flip charts and handouts; auditory learners will appreciate class-wide discussions, debates, and cooperative learning strategies; and tactile/kinesthetic learners will enjoy hands-on learning through the use of manipulatives and project-based learning. Approaching and assessing learning using multiple modalities allows a wider range of students to successfully participate in classroom learning (Gardner, 1983).
- ¶ *Female and male students have distinct needs in Math and Science that can be effectively served in singlesex classes.* Smith Leadership Academy will have single-sex classes in math and science to offer girls and boys the opportunity to excel in these areas. Research shows that both girls and boys' thrive in a single-sexed environment. In an all girls environment classrooms are not dominated by boys, thereby allowing girls to learn the important lessons and the considerable rewards of leading (Stipek & Granlinski, 1991). Separating boys and girls for math improves girls' attitudes towards math (Gill, 1994). Cornelius Riordan, an educational researcher and associate professor of sociology at Providence College, discovered that while the results of single-sex education are apparent for girls, these positive impacts are even more dramatic for African-American and Hispanic children, male and female. "The performance of African-American and Hispanic students in single-sex schools is stronger on all tests, on average scoring almost a year higher than similar students in coeducational settings." Finally, the U.S. General Accounting Office reports: "Educators and other experts with whom we spoke view single-gender programs as a way to address high dropout rates, low academic achievement, and other problems faced by many urban males."
- ¶ *Meaningfulness is enhanced through interdisciplinary learning and real-world application of content knowledge and skills.* Research indicates that interdisciplinary instruction adds meaning and relevancy to

learning as students discover fascinating and compelling relationships between disciplines (Mathison and Mason, 1989). Smith Leadership Academy is committed to teaching children practical applications of academic skills (e.g. calculating sale discounts and tips, writing cover letters and resumes) and practical skills (e.g. time management, daily calendars, and “to do” lists). We also supplement traditional coursework with school and community learning projects that expand upon classroom learning and provide opportunities for students to use academic and social skills to resolve real world problems faced by public and private sector organizations.

- ¶ *Critical thinking skills are developed through problem-solving experiences.* Critical thinking emphasizes the ability to gather, analyze, evaluate, and use information effectively. Educational experts recommend that students be taught to think logically, analyze and compare, question and evaluate in all of their coursework. Skills taught in isolation do little more than prepare students for tests of isolated skills” (Spache and Spache, 1986). Our students will learn to determine the relevance and validity of information; detect relationships between pieces of information; structure problems, develop solutions, and evaluate their feasibility.
- ¶ *Modeling strongly influences students’ ethics and core values.* Research suggests that the classroom must nurture an environment providing modeling, rehearsal, and coaching, for students and teachers alike, to develop a capacity for informed judgments (Brown, 1984; Hayes and Alvermann, 1986). What students see and do in their youth molds their personality and character in adulthood. Through our words and actions we model expected behaviors and encourage activities that support habits and values that students can rely on for the rest of their lives.
- ¶ *Intellectual tolerance is developed through exposure to and analysis of the ideas of others.* Intellectual tolerance focuses on enabling students to understand that there are at least two sides to every argument and that parties with contradicting ideas may both have logically sound and socially acceptable arguments.
- ¶ *Comprehension and retention are increased through effective review.* Tutoring and enrichment sessions offer all students the opportunity to revisit and clarify concepts that they did not understand in class and to discuss varied applications of these concepts.

Teachers at Smith Leadership Academy use an array of teaching methodologies including, but not limited to, the following:

- ¶ *Socratic Instruction:* Socratic questioning is used as frequently as possible in assignments and class discussions. Socratic questioning draws out students’ knowledge and assumptions and fosters critical thinking, evaluation, and paradigm shifts in students.
- ¶ *Grouping and Cooperative Learning Techniques:* Students work together in small mixed ability groups to accomplish shared learning goals. These techniques enable students to develop interpersonal and teamwork skills by teaching them to become active listeners, deliver and accept feedback, dissent constructively, reach group consensus, coach and tutor their peers.
- ¶ *Interdisciplinary Instruction:* Students link seemingly discrete pieces of knowledge and enhance their ability to recognize and apply prior knowledge to new, seemingly unrelated learning situations. In an educational era where tremendous emphasis is placed on specialized knowledge, the

segregated clustering of subject area instruction often prevents students from identifying important interconnections among the subjects they study and the issues they confront in the world today.

- ¶ *Differentiated Instruction:* Offering an array of learning options designed to tap into different student readiness levels, interests, and learning profiles. For example, teachers may use tiered activities through which all learners work with the same important understandings and skills, but proceed with different levels of support, challenge and complexity or teachers may develop personal task lists written jointly with the student to be completed when the student completes her work early.

SUMMARY OF EXTERNAL STANDARDIZED TEST RESULTS

- ¶ During the 2003 -2004 school year, we collected baseline data for each of the following standardized tests:
 1. *MCAS Achievement Tests:* 4th grade MCAS exam results play an important role in detecting learning gaps and developing an individualized learning plan that aims to remedy them for each student. Throughout their time at the Academy, all students will continue to take the state required grade 6th-8th grade MCAS tests in all core subjects.
 2. *Stanford 9 Achievement Tests:* All students take the Math and English Stanford 9 Achievement tests directly following enrollment and at the end of each school year at the Academy.
 3. *Myers-Briggs Personality Test:* All students take this test so that we can better understand their personal leadership style and personality preferences, particularly with respect to energy source, information gathering, decision-making, and lifestyle/work patterns, and measure the changes they undergo throughout their time at the Academy.
- ¶ Our aim in collecting baseline achievement data is to detect each student's learning gaps prior to the start of school so that we can develop an individualized learning plan that best suits the needs of each individual student. While we have received the baseline information for each of the above mentioned standardized tests, the year-end results are still in process and are expected to arrive in late August 2004.

SUMMARY OF INTERNAL ASSESSMENT RESULTS

¶ **Internal Assessments**

- *Exams, reports, and homework including projects:* The Academy primarily uses traditional forms of assessment, such as exams, reports, and homework, to measure students' academic achievement. Each teacher uses a combination of these assessments to determine student's final grades. Each teacher also prepares a final examination that tests students' cumulative knowledge and skills at the end of the school year. These final examinations are worth 25 percent of the student's total grade.

¶ **Reporting of Internal Assessments**

- *Parent Teacher Meetings and Report Cards:* Each Trimester parent(s)/guardian(s) are required to attend Report Card Night, an in person meeting with each of their child's teachers to discuss their child's academic progress. In the meeting, parents receive their

child's report card and teachers give an overview of each student's performance and clearly define the Academy's academic standards. Additional meetings are scheduled by teachers and parents on an as needed basis.

¶ **Internal Assessments Role in Determining Grade 6 Promotion**

- A combination of internal assessments are used to assist in determining each child's eligibility for promotion:
 - Student must be able to recite the mission and core values of Smith Leadership Academy Charter School from memory and explain its meaning.
 - Students must earn at least 4 credits and have a passing grade for at least 3 of 4 core subjects which include Language Arts, Mathematics, Science, and Social Studies. Each core academic subject is valued at 1.0 Credit Units. A passing grade is defined as 70 % or above on course work, assignments quizzes/ and or tests.
 - Students must be in attendance for 90% of the school year, unless absences are excused.
 - Students are required to pass the U.S. Citizenship exam.
- Students who fail to meet the requirements for school promotion will be retained and the case reviewed by the Principal, Instructional Leader, teachers and parent(s). Students will be required to pass a test after summer school to ensure they meet requirements for transitioning to grade 7.

¶ **Grade 6 Promotion Results**

- Five students were retained in grade 6 based on failure to meet grade level promotional requirements. All of these students attended summer school.

NUMBER OF DAYS OF INSTRUCTION FOR THE 2003 – 2004 SCHOOL YEAR

¶ The Academy completed a total of 200 instructional days in its inaugural year. The school year began on September 3, 2003 and ended July 16, 2004. During the second half of the school year, students also participated in Saturday Math MCAS prep sessions.

NCLB REPORT CARD

¶ We do not currently have an NCLB report card.

GOVERNANCE PROFILE

LIST OF THE BOARD OF TRUSTEES

Chairperson

- ¶ **William L. Lahey, Palmer & Dodge LLP.** *J.D. University of Wisconsin Law School; B.S. University of Wisconsin.* Bill is a partner and chairman of the Litigation Department at Palmer & Dodge and head of its Environmental and Land Use Group. He specializes in representing public sector clients, including serving as town counsel to a number of Massachusetts communities. He is on the regional boards of the NAACP Legal Defense and Education Fund and The Posse Foundation.

Trustees

- ¶ **S. Roopom Banerjee, McKinsey & Company.** *M.P.P., Kennedy School of Government, Harvard University, B.S. MIT* Roopom is currently working as a management consultant for McKinsey & Company helping CEO-level senior management turbocharge their corporate growth strategy and maximize operational effectiveness. Prior to McKinsey, he worked as an Associate for Goldman Sachs's Fixed Income, Currencies & Commodities Group (in Health Care Finance), and previously as a Research Scientist in the Human Genome Project and Dana Farber Cancer Institute. Roopom also has over 4 years of math and science teaching experience as an instructor for Kaplan, Princeton Review, and other test prep programs.
- ¶ **Scott Darling III, Conservation Law Foundation.** *J.D. Suffolk University Law School, B.A. Clark University.* Mr. Darling is a lawyer and a certified urban planner. Currently, he works as an attorney at the Conservation Law Foundation (CLF) where he has worked for the Communities Project and CLF Ventures on issues of smart growth and livable communities. Formerly in private practice, Darling has managed major real estate development projects in the city of Boston. He has also served as the Executive Director of the Freedom House and as a Founder and former Co-chairperson of the Board for the Benjamin Banneker Charter School in Cambridge.
- ¶ **Rev. RoAdrienne Davidson, Zion Holiness Church.** *M.A. Education, B.S.E., State College of Boston.* RoAdrienne is a pastor for the Zion Fire Baptized Holiness Church in Roxbury. Previously, she worked as a Director of the Employed Worker Collaborative for the Corporation for Business Work and Learning, Director of Training Services for the Bay State Skills Corporation, Director of Assessment and of Vocational Training Services for the A.B.C.D. Center, and as a Boston Public School Teacher. RoAdrienne not only has deep connections to her roots the Roxbury community, she also has 36 years of teaching and counseling experience as well as education and training program design, development, and implementation experience.
- ¶ **Virginia DiFranza, Retired Principal. Ed.D.** *Boston University, M.Ed and B.S. Northeastern University.* Dr. DiFranza is also a graduate of the Education Policy Fellow Program, George Washington University. Dr. DiFranza is presently a supervisor for administrative interns at the Harvard Graduate School of Education. She brings over 35 years of experience in urban public and private K-12 education. She has served as a teacher, administrator and college instructor. For the past 12 years she has been an elementary principal for the Boston Public Schools. Previously, she was an Assistant Headmaster for Brighton High school and a District Coordinator of Curriculum and Competency Resources. Dr. DiFranza has received several awards for her contributions to the community. She is a recipient of the Outstanding Alumni Award in Education from Northeastern University.

- ¶ **Jacqueline J. Hogan, Retired Principal.** *M.Ed., Boston College, B.S., Boston State College.* Jacqueline has just retired from the Boston Public School System after 30 years of service. She began her career as a Kindergarten teacher but transferred into the Special Education Department after receiving her Masters Degree in that field. While in that Department, she held several administrative positions at both middle and high school levels. In 1989, she became Principal of the Lucy Stone Elementary School. In 1991, she was appointed Principal of the new Oliver Wendell Holmes School, and open the new Inclusion Program for elementary school children in September of that year. Although retired, she continues to serve the community and its children as a board member of New England Scores, an after school program for young children, a member of the Advisory Board of the Massachusetts Commission Against Discrimination and a new member of the Board of Trustees of Smith Leadership Academy Charter School.

- ¶ **Dr. Richard O'Bryant, Northeastern University.** *Ph.D. M.I.T; B.S. Howard University.* Son of John D. O'Bryant, Richard O'Bryant is a professor of technology at Northeastern University. Formerly, he co-managed a grant from the W.K. Kellogg Foundation to study the role of technology for community building and empowerment with a focus on low-income HUD housing development communities in Roxbury. O'Bryant has extensive volunteer community involvement through the Concerned Black Men of Massachusetts, Incorporated (CBMM) and Bridging Bridges where he works with young black males in a creative learning environment.

- ¶ **Kweilin Moore, Harvard Business School.** Candidate MBA, Harvard University. *B.A. Economics and Political Science, Harvard University.* Kweilin is currently a student at Harvard Business School. Formerly, she worked for the Center for Women & Enterprise in Roxbury, a non-profit organization that helps women of all income levels start and grow their businesses. Kweilin has also worked as a management consultant for McKinsey & Company where she focused primarily on investment banking strategy, non-profit growth strategy, and IT implementation.

- ¶ **Akiba Smith-Francis, Harvard University.** Candidate MBA & MPP, Harvard University. BA Harvard University. Akiba formerly worked as a business analyst in McKinsey's Miami office, which focused on the economic development of Florida, Central America and the Caribbean. She designed organizational structure and strategy for a large national nonprofit and assisted several small local education nonprofits develop a business plan and expansion strategy; performed analyses of industry competitive and funding landscapes; designed and presented industry overviews for a leading asset management company. Lead the office's community service activities by establishing a relationship with hospice for the homeless living with HIV, organized various community service events and coordinated the annual United Way campaign. Akiba has also worked for Goldman Sachs & Co. as a financial analyst and for the United States Department of State as an intern. Akiba also serves as a member of the Advisory Board of Cool Kids Learn and founded the Harvard Branch of Women and Youth Supporting Each Other.

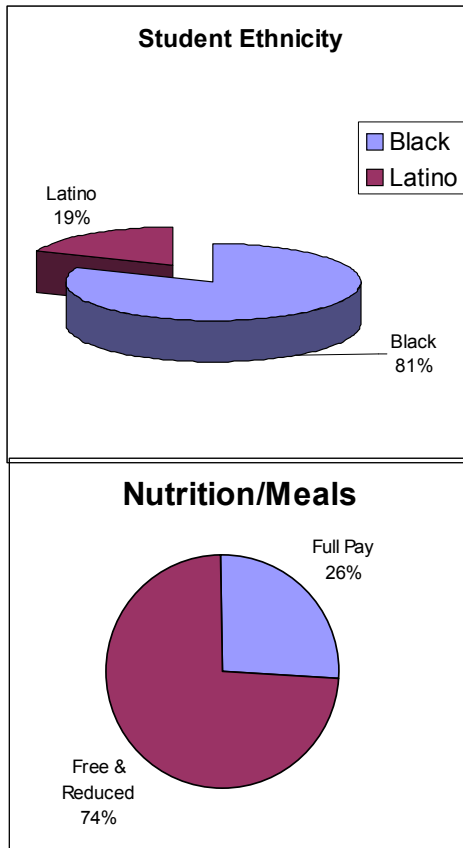
SUMMARY OF MAJOR BOARD POLICY DECISIONS

- ¶ **April 10, 2004.** Election of new Board member Virginia DiFranza, Retired Principal. Ed.D.
- ¶ **June 12, 2004.** Approval of the FY2005 Budget. School name change to Smith Leadership Academy Charter Public School.

SUMMARY OF OFFICIAL COMPLAINTS RECEIVED BY THE BOARD OF TRUSTEES

- ¶ No official complaints were received by the Board of Trustees during the Academy's inaugural year.

STUDENT PROFILE



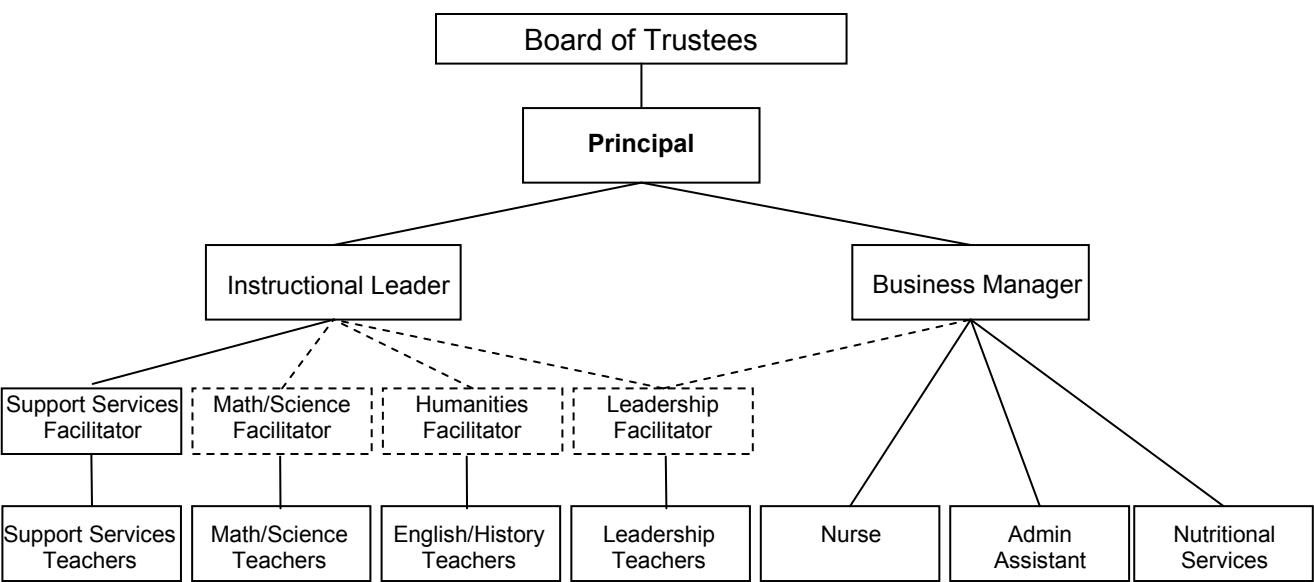
- ¶ **Student Demographics.** During the 2003-2004 school year, we had a total of 88 enrolled students.
- Males represented 46 percent of the population and females represented 54 percent.
 - African-American/Black students represented 81 percent of all students and Hispanic/Latino represented 19 percent of all students.
 - None of our students is Limited English Proficient (LEP).
 - Special Education students represent 8% of our student population.
 - Free and reduced lunch students represent 74% percent and full pay students represent 26%.
 - The majority of our students live in Dorchester and Roxbury.
- ¶ **Total number of student applications received.**
- The Academy received 160 applications for 88 enrollment slots in its inaugural year.

- ¶ **Student turnover data. A total of 11 students left during the 2003-2004 school year.**
- 3 students left due to geographic moves which required them to leave the state of Massachusetts.
 - 7 students left to attend other schools within the state of Massachusetts. Four parents cited the extended day (8:00A.M. – 5:00PM) as the primary motivating factor in moving their students, noting that their children wished to participate in offsite after school enrichment activities. Two parents believed that the school culture was too “strict” for their children. One student left to attend a private school.
- ¶ **Number of students expelled or placed on in-school or out-of-school suspension.**
- 0 students were expelled from the Academy in its first year.
 - 42 students were suspended from the Academy for at least 1 day. Most suspensions occurred during the first trimester as students acclimated themselves to the more disciplined academic and cultural expectations.
 - The attendance rate was 90 percent for the 2003– 2004 school year¹.

¹ Attendance rate omits excused student absences (e.g. medical absences).

STAFF PROFILE

SMITH LEADERSHIP ACADEMY ORGANIZATIONAL CHART



Solid lines signify positions existing in FY2004

Dotted lines signify positions to be filled in FY2005/2006

Name of principal and other administration

¶ **Thomas L. Smith, Principal & Lead Founder.** *M.P.P., Harvard University, Kennedy School of Government; B.S. Secondary Education, Seton Hall University.* Thomas formerly served as a Fellow for the Massachusetts Charter School Resource Center and a pro-bono consultant to Academy of the Pacific Rim Charter School, Boston. Thomas is a certified teacher of Social Studies and has teaching experience in public, private, and alternative juvenile reform schools. Thomas also has extensive private sector experience. He has worked as a management consultant for McKinsey & Company where he helped senior management to build new businesses and optimize existing ones and as a Financial Analyst for Merrill Lynch’s Corporate and Institutional Client Group.

¶ **Karmala Sherwood, Instructional Leader.** *M.Ed. Lesley University, in Reading Supervision and Administration; M.A. Tufts University; B.A. Albion College.* Karmala has more than 20 years of experience in the Boston Public Schools. Her areas of expertise include school reform; standards based learning, literacy, and closing the gap in achievement. Most recently, Karmala served as Assistant Principal of Taylor Elementary School. Previously, she served in several BPS district

level positions, including Comprehensive School Planning Specialist, Title I Coordinator, and Reading Coordinator. Karmala's experiences as an assistant principal and administrator with a focused concentration in the area of early literacy, as well as middle and high school literacy have made it possible for her to thrive on challenges in various areas of education. Karmala also has more than a decade of K-9 teaching experience in literacy, mathematics, and visual arts in urban and suburban settings.

¶ **Thea Stovell, Business Manager.** *M.S.W. Social Policy and Admin, Boston College. BA English, Boston College.* Thea has 12 years of experience leading and directing programs that serve inner city youth. She formerly served as Director of Social Services for Volunteers of America, a non-profit human service agency that services seniors, adolescents, and adults. While there, Thea managed eight programs including assisted living, drug addiction, adolescent group homes, independent living programs, and a DYS program. Her responsibilities included developing and managing programmatic budgets, employee hiring and termination, monitoring grant expenditure, ensuring legal compliance, and maintaining and developing public relations. Thea has also served as a team leader for City Year, the urban peace core, where she provided community service to the underprivileged.

¶ **Ellie Rounds, Support Services Coordinator.** *M.S.Ed. Simmons College, in Moderate Special Needs; B.A. Mount Holyoke College.* Ellie has worked for the last six years in public schools, both in general education and special education settings. In 1998 she was selected to be a part of the Teach for America program and taught for high school special education in rural Louisiana for three years. While there she initiated an inclusion program for self-contained special education students and co-taught English with a general education partner teacher. She also developed and coordinated an on-campus work program for mild/moderate students. While teaching in Louisiana, Ellie developed a strong passion for inclusive education, and has remained a strong advocate for inclusion. More recently, she taught 7th grade English Language Arts in an inclusive classroom at another Boston charter school.

SUMMARY OF CLASSROOM TEACHER QUALIFICATIONS

¶ All teachers had previous teaching experience. All core curriculum teachers had a minimum of two years teaching experience in a public or independent school. Experience for all teachers ranged from one to five years. Ninety-two percent of the Academy's teachers were highly qualified. Sixty-three percent were licensed.

TEACHER TURNOVER

¶ The Academy had 8 founding teachers, 5 of whom will return for the second year of operation. The three departing teachers have left the Academy for different reasons. One teacher was not extended an offer to return based on his/her annual performance review. Two teachers sought career advancement at a rate that was not consistent with their performance evaluations.

FINANCIAL PROFILE

¶ Financial statement for the fiscal year 2004

Smith Leadership Academy Charter Public School Profit & Loss July 2003 - June 2004

	<u>Total</u>
Income	
10 State Revenue	
Total 10 State Revenue	\$ 838,509.02
Total 20 Federal Revenue	\$ 302,229.00
Total 30 Local Revenue	\$ 11,313.83
Total 40 Private Revenue	\$ 133,325.84
Total Income	\$ 1,285,377.69
Expenses	
Total 100 School Administration	\$ 254,765.94
Total 200 Instructional Staff	\$ 318,191.05
Total 300 Special Education	\$ 84,502.45
Total 400 Instructional Expenses	\$ 85,856.95
Total 500 Business Services	\$ 129,457.61
Total 700 Facilities	\$ 206,958.42
Total 800 Student Services	\$ 93,585.99
Total 900 Board of Trustees	\$ 335.96
Total Expenses	\$ 1,173,654.37
Net Operating Income	\$ 111,723.32
Net Income	\$ 111,723.32

¶ Balance sheet setting forth the charter schools assets, liabilities, and fund balances or equities.

**Smith Leadership Academy
Charter Public School
Balance Sheet
As of June 30, 2004**

	<u>Total</u>
ASSETS	
Current Assets	
Total Current Assets	<u>\$ 347,183.97</u>
Total Fixed Assets	<u>\$ 17,251.36</u>
TOTAL ASSETS	<u><u>\$ 364,435.33</u></u>
LIABILITIES AND EQUITY	
Liabilities	
Total Current Liabilities	<u>\$ 230,564.65</u>
Total Liabilities	<u>\$ 230,564.65</u>
Total Equity	<u>\$ 133,870.68</u>
TOTAL LIABILITIES AND EQUITY	<u><u>\$ 364,435.33</u></u>

¶ Approved school budget for fiscal year 2005

**SMITH LEADERSHIP ACADEMY
CHARTER PUBLIC SCHOOL
FY2005 Operating Budget**

Revenue	
10 State Revenue	05 Forecast
Total 10 State Revenue	1,649,073
20 Federal Revenue	
Total 20 Federal Revenue	308,590
30 Local Revenue	
Total 30 Local Revenue	12,531
40 Private Revenue	
Total 40 Private Revenue	
Total Income	1,970,194
Expenses	
100 School Administration	
Total 100 School Administration	331,438
200 Instructional Staff	
Total 200 Instructional Staff	635,610
300 Special Education	
Total 300 Special Education	143,098
400 Instructional Expenses	
Total 400 Instructional Expenses	133,209
500 Business Services	
Total 500 Business Services	190,847
700 Facilities	
Total 700 Facilities	300,009
800 Student Services	
Total 800 Student Services	133,562
900 Board of Trustees	
Total 900 Board of Trustees	1,360
Total Expenses	1,869,133
Net Operating Income	101,060
Net Income	101,060

DISSEMINATION

DEFINE BEST PRACTICES AND DISSEMINATE THEM TO THE PUBLIC

¶ In our first year, we have sought to identify and cultivate best practices within our school so that we might be prepared to share them as our school develops.

- *City, state, and national conferences:* The primary vehicle we have used for disseminating our practices to date is city, state, and national educational conferences. The Academy has regularly sent representatives to local, state, and national education conferences in order to disseminate the Academy's best practices. This year these conferences included, but were not limited to those sponsored by the Massachusetts Charter School Association and the Federal Department of Education.
- *Project for School Innovation (PSI):* We have begun the process of teaming with PSI a local non-profit whose mission is to transform education by supporting grassroots networks for educators to share their successes and drive school change. We expect that our involvement with PSI will enable us to receive and disseminate best practices from a multitude of successful public schools.
- *Teacher visits exchange programs to/from other schools:* This year our teachers participated in opportunities to visit other public schools outside of the Boston area. We believe this experience-based learning will help disseminate the methods and conventions used by Smith Leadership Academy, as well as promote a better understanding of the student's broader community and learning environment.
- *"State of the Academy Addresses:"* We have also issued regular State of the Academy reports to the Board of Trustees, the Parent Leadership Team, and to general audiences at Smith Leadership Academy events that detail new developments and successes at the Academy.
- *Partnerships with universities and businesses.* This year we further cultivated and developed our relationships with
 - Palmer and Dodge LLP: In July 2004, Smith Leadership Academy was awarded the Palmer & Dodge Non-profit Client of the Year Award. Eight students attended the awards ceremony and offered a presentation to the lawyers and the support staff.
 - Harvard University: In April 2004, eight students attended Harvard University Business School and made a presentation to the Harvard students focusing on the role of technology in education. In July, Harvard offered Principal Thomas Smith a tuition scholarship to attend *Creating New Schools: The Strategic Management of Charter Schools* further developing the relationship between the Smith Leadership Academy and Harvard University.