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July 18, 2014
Board of Elementary and Secondary Education
Massachusetts Department of Elementary and
Secondary Education 75 Pleasant Street
Malden, MA 02148

Dear Board,

On behalf of the KIPP Academy Lynn Board of Trustees, I respectfully request your approval of an amendment to change our charter to (1) add elementary grades K-4, and (2) add seats to our already approved grades 5-12. This is an amendment request to change maximum enrollment and grades served and would increase our total maximum enrollment from 850 to 1,586 seats. This amendment would be effective upon approval by the Board of Elementary and Secondary Education, with projected changes completed by FY2020 when all planned grades are fully enrolled.

As documented in our recently approved charter renewal, since its founding in 2005, KIPP Academy Lynn (and KIPP Academy Boston) has been an academic success, a viable organization, and true to its charter. Confident in our Proven Provider qualifications, our Board of Trustees wishes to expand our charter in Lynn because of:

- **Rising Demand:** Growing demand and waitlists for our middle and high school seats and a strong community interest in KIPP Lynn adding an elementary school to our overall program, with many seats available in Lynn under the charter cap.
- **Improving Student Growth and Achievement:** Improvements in teaching and learning have led to improved student results at KIPP Academy Lynn (evidenced by SY2013 MCAS results and SY2014 assessments). We also believe based on evidence within the KIPP network that a K-12 pathway will dramatically improve college graduation and life outcomes.
- **Access for All Students:** Our commitment to access, choice, and support for all students, evidenced by KIPP's unique track record and plan to backfill all grades K-10, to reach and retain high needs students and to maintain attrition below 5%, and support alumni *to and through* college or other pathways.
- **Strengthened Organizational Capacity:** Over the years, KIPP has significantly increased its leadership, talent, and systems capacities and has strengthened its compliance. By adding high school grades and launching KIPP Academy Boston, we have gained valuable experience with how to grow with quality.
- **Operational Viability:** Building on a base of operational effectiveness, financial stability with clean audits, private fundraising capability and real estate successes, our proposed larger enrollments favorably align with our models for financial sustainability, facilities, and program quality.

The KIPP Academy Lynn Board of Trustees voted to approve this request on June 12, 2014 at a meeting held in compliance with Massachusetts Open Meeting Law G.L. c. 30A, §§ 18-25.

The KIPP Academy Lynn Board of Trustees requests that the Board of Elementary and Secondary Education at its next appropriate meeting. Please contact me at cdolan@kippma.org or (617) 595-7315 if you have any questions about this request.

Sincerely,

Caleb Dolan

Executive Director and Board Member, KIPP Academy Lynn and KIPP Academy Boston

CC: DESE Charter School Office; KIPP Lynn & Boston Board of Trustees Enclosures

Work hard. Be nice.



KIPP Academy Lynn Public Charter School
Major Amendment Request to DESE
(Maximum Enrollment with Change in Grades Served)

July 22, 2014

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1: Mission and Key Design Elements

1.1 Summary of Request

Currently, KIPP Academy Lynn Charter School (KALCS) holds a charter to serve grades 5-12 for a maximum enrollment of 850 seats, all of which are pre-enrolled to be filled in FY15. Now, to reach grades K-12 and serve more students, KALCS is requesting two amendment changes to its existing charter: an increase in the enrollment of its current grades (5-12), and the addition of new grades (K-4). We seek to add elementary grades in order to both respond to community demand and fulfill the KIPP model of serving students in grades K-12, which, along with our alumni support services, best prepares students for college and career readiness. We seek to expand enrollment of our existing middle and high school grades in order to reach more students, to respond to demand from families evidenced by our long waitlists for existing grades (508 students), to accommodate students from elementary grades, and to fully leverage the human, financial, and facility resources we can deploy to support our schools while still achieving high quality outcomes. From our currently approved 850 seats for grades 5-12, we are requesting an increase of 736 seats to reach a total of 1,586 seats for K-12. Of the 736 additional seats, 600 are requested for elementary grades K-4 and 136 seats are requested to increase the size of existing middle and high school grades 5-12. KIPP would continue to maximize access wherever possible and backfill all available seats in every grade K-10. If awarded to KIPP, this request would still leave approximately 984 seats available under the current maximum charter cap for Lynn.

1.2 Mission Alignment – Describe how the amendment request is consistent with the school’s mission.

Massachusetts has fostered a number of outstanding traditional and public charter schools that focus on closing the educational achievement and opportunity gaps. KIPP Massachusetts’ unique position as a locally controlled member of the nation’s largest successful charter network allows us not only to close the achievement gap for our students but ultimately close the educational attainment gap. We expand educational opportunities for all students by building schools that help students develop character strengths and academic skills while providing the strong school culture and additional supports that keep all students engaged. Evidence of the success of our model can be found in the mix of excellent test scores, positive responses on parent and student surveys, and some of the lowest attrition of any charter school in Massachusetts.

Our mission at KIPP Massachusetts is to create an environment where students develop the academic skills, character strengths, and intellectual habits necessary to maximize their potential in high school, in college, and in life. Our program is based on: a longer school day and year, academic and character development, a relentless focus on student outcomes and college graduation, intensive professional development and continuous coaching for teachers and staff, and a system of support for students in grades K-12 and KIPP Through College support. Throughout our ten years of operation in Massachusetts and twenty years across the country we remain focused on our mission to develop the academic and character strengths necessary to thrive in college and career. Our requested expansion into elementary grades is consistent with this mission because starting a KIPP education at age five significantly increases our impact on a child’s academic skills and strengthening of character habits and also provides more opportunities to work with families on college knowledge and begin to prepare for the cost of college early. Based on the results from other KIPP elementary schools and other high performing local operators, we believe that elementary expansion will improve outcomes for all our kids.

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1.3 Enhanced Opportunities & Changes to Key Design Elements – Describe how this amendment enhances or expands the educational opportunities currently available to the targeted student population. Incorporate a discussion regarding the key design elements of your school into your response. If applicable, indicate how the proposed change to grades served will impact any key design elements of the current educational program or curriculum model.

We seek to add elementary grades in order to both respond to community demand and to fulfill the KIPP-intended model of serving students in grades K-12, which, along with our alumni support services, best prepares students for college and career readiness and success. Our mission for KIPP Academy Lynn Elementary will be the same mission as the other KIPP schools in our region: “to create a school environment where students develop the academic skills, intellectual habits and character traits necessary to maximize their potential in college and in life.”

KALE will share the same characteristics as our other schools in Massachusetts:

High Expectations

KIPP schools have clearly defined and measurable high expectations for academic achievement and strong character that make no excuses based on the students' backgrounds. Students, parents, teachers, and staff create and reinforce a culture of achievement and support through a range of formal and informal rewards and consequences for academic performance and behavior.

Choice & Commitment

Students, their parents, and the teachers of each KIPP school choose to participate in the program. No one is assigned or forced to attend a KIPP school. Everyone must make and uphold a commitment to the school and to each other to put in the time and effort required to achieve success.

More Time

KIPP leaders, students, and families know that there are no shortcuts when it comes to success in academics and life. With more hours in the school day, more days in the year, and more years in the lives of our students (K-12 and KIPP support through college), students have more time in the classroom to acquire the academic knowledge and skills that will prepare them for competitive colleges and other post-secondary paths, as well as more opportunities to engage in diverse enrichment activities and experiences.

Power to Lead

The principals of KIPP schools are effective academic and organizational leaders who understand that great schools require great school leaders. They have control over their school budget and personnel with accountability to student outcomes. They are free to swiftly move dollars or make staffing changes, allowing them maximum effectiveness in helping students learn.

Focus on Results

KIPP schools relentlessly focus on high student performance on standardized tests and other objective measures. Just as there are no shortcuts, there are no excuses. Students are expected to achieve a level of academic performance that will enable them to succeed at the nation's best colleges and other post secondary paths.

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We anticipate that by serving grades K-4 in Lynn we will change aspects of our middle school and high school model. Our goal is for 90% of KALE's K-4 students to enter KAL performing at or above grade level. This will enable us to change courses we currently offer at both the middle and high school levels. For example: we plan to offer Algebra I in 8th grade rather than beginning Algebra in 9th grade, and we will increase the number of AP courses in our high school, such as AP World History and AP Biology, because more students will be academically ready for the rigor of an AP curriculum. Additionally, because our K-4 curriculum will include science several times a week, our 5th grade science curriculum will focus more on deep inquiry and application of content rather than on review and remediation aimed at getting our entering 5th graders up to grade level as it is today.

1.4 Faithfulness to Mission (OPTIONAL) – *Schools may choose to summarize briefly within their request the school's track record of success in demonstrating faithfulness to its mission, implementing the key design elements outlined in its charter, and substantially meeting its accountability plan goals. The summary should provide additional context to any recent circumstances in the school's history involving these areas of the school's performance.*

KIPP Academy Lynn recently completed its second charter renewal cycle. We have demonstrated exceptional faithfulness to our charter in terms of our commitment to access and equity. Our long term outcomes for high school and projected college graduation are strong and the current arc of our academic results will meet or exceed the updated accountability plan goals although the current accountability plan still references outdated metrics around high school placement and No Child Left Behind. For the new charter period FY15-FY19, we are revising and updating our accountability plan using new DESE guidelines.

We have continued to provide an extended school day and year with extensive character education as described in our key design elements. We have resolved some issues of faithfulness to our charter in terms of documenting changes to our calendar and schedule and have incorporated lessons learned from those issues into an increased systematic attentiveness to compliance and communication with the DESE. Changes to our compliance strategy are outlined in detail in section 3: Compliance.

2: Access and Equity

2.1 Need for Expansion – *Describe how the charter school has determined a need to increase maximum enrollment and/or increase the grade span. Strong evidence includes feedback from parent and faculty surveys, a historical pattern of increasing admission applications, and a growing population of eligible students in local region.*

Massachusetts has fostered a number of outstanding traditional and public charter schools that focus on closing the educational achievement and opportunity gaps. As a locally controlled member of the nation's largest successful charter network, KIPP:MA is able to share best practices with our local peers in district and charter schools alike and scale our results to other KIPP schools across the nation, allowing us to close not only the achievement gap for our own students but ultimately close the educational attainment gap on a national level. We expand educational opportunities for all students by building schools that help students develop character strengths and academic skills while providing the strong school culture and additional supports that keep all students engaged. Excellent internal

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and state standardized test scores, positive parent and student survey responses, and exceptionally high student retention rates serve as evidence of the success of our model.

Outside of the Lynn Public School system, there is no kindergarten entry point at any of the private schools in the city. In other words, families with rising kindergartners have no choice but to send their children to a Lynn Public elementary school for kindergarten. KALE would provide Lynn families with an alternative – a high quality educational program that would start students as early as kindergarten and see them through not only elementary, middle, and high school, but also through college, through KIPP’s KIPP Through College and career program.

Finally, as evidenced by the MCAS results of Lynn elementary school students, many students in Lynn’s elementary schools are struggling to reach proficiency and move towards college readiness in reading, mathematics, and science (see table below). We are excited to recruit students who are entering school without basic skills and provide them with a joyful and rigorous foundation in a KIPP elementary school in an effort to catch them up and close the achievement gap.

Lynn District: 2012-2013 MCAS Performance

Grade and Subject	Proficient or Higher		Advanced		Proficient		Needs Improvement		Warning/Failing	
	DISTRICT	STATE	DISTRICT	STATE	DISTRICT	STATE	DISTRICT	STATE	DISTRICT	STATE
GRADE 03 - READING	37	57	3	12	34	45	52	36	11	8
GRADE 03 - MATHEMATICS	58	66	20	31	38	36	27	22	15	11
GRADE 04 - ENGLISH LANGUAGE ARTS	35	53	3	10	31	43	45	33	21	13
GRADE 04 - MATHEMATICS	35	52	6	18	28	34	51	38	15	10

Bringing students into KIPP at the elementary level will help them begin their public education with tremendous progress in their academic and character development. Not only will this help change the MCAS outcomes above, but early literacy and numeracy will set students on track towards the college graduation and life outcomes they seek.

Not only is there a demonstrated need for a KIPP elementary school, but there has also been a need expressed to expand the number of seats available at the existing grade levels in KIPP Academy Lynn (KAL) and KIPP Academy Lynn Collegiate (KALC). After the most recent admissions lottery, there were over 500 families on a waitlist for available seats at the existing KIPP Lynn schools, and although we are willing and eager to backfill any open seats through the tenth grade, KIPP families are so satisfied with their KIPP experiences and student retention at the existing schools is so high that seats simply are not opening to offer a KIPP experience to many students on the waitlist. One way to mitigate this problem is to expand KAL and KALC with additional seats.

Our scale and commitment to supporting students to and through college allows KALCS students to benefit from in-depth national research on key factors in K-12 education that support college graduation. Nationally, approximately 29% of all students in the United States complete college and receive an undergraduate level degree. If narrowed down to include only low-income students in communities like Lynn, the rate of college completion lowers to 8%.

Because of this fact, we are convinced of the importance of offering a K-12 education and support through college that gives our students the best opportunity to succeed. If granted additional seats to open an elementary school, a

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KALE student will receive support from K-12 and through college. KAL already has demonstrated a track record in helping students reach high levels of achievement, as demonstrated by its founding class of 2012. Members of this founding class began with KAL in the fifth grade, and although there was no KIPP high school option for them to attend at that time, the KIPP Through College (KTC) program provided these students with services after leaving middle school to attend high school elsewhere. Even with only a middle school KIPP experience, 89% of KAL's founding class of 77 students matriculated to college, compared with 59% of Lynn Public School students (class of 2011), 75% of students statewide (class of 2011), and only 41% of low-income students in general. Of this founding KIPP class of 2012, 68% of the students who matriculated to college are persisting in college. Through the KIPP national network, data has proven that the consistency of a KIPP:MA program through high school will increase the college matriculation and graduation rate of our students and alumni. The class of 2015 will be the first class attending KIPP:MA from fifth through twelfth grade, and projects to achieve the strongest college matriculation (90%) and graduation outcomes to date. Bringing students into the KIPP program at an earlier age and expanding the existing grades to serve more students will ensure that an increased number of students will receive the full range of KIPP services from the earliest years of their academic careers, all the way to and through college.

2.2 Demonstrated Parent Support – *Describe how the school has determined that there is sufficient parent support to fill existing and proposed seats and/or grades at the school under the proposed amendment.*

KALCS has significant evidence of parental support for expanding the school and providing additional seats for parents and families who want their children to attend KIPP Academy Lynn schools.

Firstly, KAL and KALC have over 500 students on waitlists, demonstrating the need and demand for additional seats at the existing grade levels. At KIPP, we believe that fostering meaningful relationships with our kids and families keeps them with us and on the path to and through college and KIPP's impressive retention rate demonstrates that families are satisfied with the KIPP program. Year-to-date retention currently stands at over 98% across KIPP:MA's three schools and in cases where a family has multiple school-aged children, parents and guardians are choosing to send the siblings of existing KIPP students to the school as well. In fact, KIPP often receives inquiries about access at the elementary level from parents of our current 5-12 students who have younger children, in addition to inquiries from other parents in the community. In the most recent round of admissions at KAL, of 89 open fifth grade seats, 38% were filled with the siblings of current KIPPsters.

To gather more formal parent feedback, KIPP:MA administers an annual Healthy Schools & Regions Survey, with results being overwhelmingly positive over the years. The survey polls KIPP students, families, teachers, non-teaching staff, and school leaders and is intended to capture measures of the inputs that impact student achievement and help to create an evidence base that informs school improvement efforts. On the 2013-2014 survey, 87% of parents at KAL and 86% of parents at KALC reported that they were satisfied with the overall quality of their child's education at KIPP. Furthermore, 92% of KAL parents and 86% of KALC parents would recommend KIPP to other families.

Additionally, KIPP Lynn has multiple groups that support the parents and families of our KIPPsters as well as the families of students across Massachusetts. KIPP Lynn has a Special Education Parent Advisory Council which provides families workshops on parental rights and allows parents the opportunity to provide school leaders with feedback and support. Likewise, KIPP Lynn's parent group, Families and KIPPsters Together (FAKT) actively

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engages KIPP families in support of KIPP. Internally, FAKT engages KIPP parents through work in committees, fundraising for its own initiatives, and holding professional development sessions for KIPP staff to identify ways to more closely work with parents and families. Led by FAKT, KIPP:MA parents actively participate in charter school advocacy, voicing support of a cap lift as well as KIPP’s plans to open an elementary school in Lynn. In April of 2013, more than 100 parents from all KIPP:MA schools gathered at the Massachusetts State House to participate in Education Hill Day and advocate for the rise or removal of the charter cap. After Education Hill Day, 17% of all 600 KIPP:MA parents followed up, writing letters to their representatives urging them to raise the cap. In September of 2013, twelve parents attended a public comment session and spoke in support of a proposed KIPP Academy Lynn Elementary School. Parent advocacy continued into 2014 with the most recent charter school legislation, as parents continued to send letters and emails to their legislators in support of a cap lift.

2.3 Eliminating Barriers to Access – *Provide a brief summary of the school’s efforts to eliminate barriers to program access, including but not limited to, recruitment and enrollment practices, retention practices, and school policies, such as student support and discipline systems. Indicate how the school’s efforts may need to evolve during implementation of the proposed expansion.*

A recent Mathematica study of KIPP schools across the country was one of the most rigorous pieces of research completed on a charter organization, and it revealed that KIPP students are demographically similar to the kids in the districts they serve and that KIPP students make achievement gap closing progress in all subject areas and demonstrate substantial gains in critical thinking compared to their demographically comparable peers who did not attend KIPP. At KIPP, we strive to demographically mirror the communities we serve and we are intent on recruiting a student population rich in English Language Learners and high needs students. Elementary schools in Lynn predominantly serve high needs students as measured by income and English Language Learner needs. KIPP Academy Lynn Charter School’s student body reflects this demographic.

Lynn Public School District: 2013-2014 Demographics

Student Population	KIPP Academy Lynn (5-11)	Lynn District (K-12)	State
English Language Learner*	14.8%	17.8%	7.9%
Low-income	80.3%	83%	38.3%
High Needs	84.9%	86.4%	48.8%

*KIPP ELLs are reported based on our most recent numbers from the end of the 2013-2014 school year. ELL demographics from Lynn District and the state are from the October 2013 SIMS data available on the DESE website.

As charter schools are public schools, KIPP Academy Lynn Elementary will be tuition-free and open to all students in the city of Lynn. KALE will recruit and ultimately serve a population of students in grades K-4 that would reflect the general demographics of the Lynn community as a whole.

KIPP is currently the only charter school option in the city of Lynn. Due to extensive outreach and adult educational programming geared towards both KIPP parents and non-KIPP parents alike, KIPP has built positive relationships with the greater community in addition to the relationships with KIPP students and their families. KIPP has targeted its recruitment efforts to families with school-aged children in Lynn’s low income communities

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as well as to families for whom English is not the primary language spoken at home. To target families with school-aged children in Lynn, we have formed partnerships with youth-serving organizations such as Girls Inc. and the YMCA. KIPP has also partnered with the North Shore Career Center and Compass Working Capital to reach lower-income families that may not otherwise have access to information about KIPP. Lastly, to reach families who speak a language other than English at home, KIPP's recruitment strategies have included printing flyers and applications in multiple languages as well as building relationships and working closely with leaders in the community and at places of worship such as St. Joseph's church, home to much of Lynn's Latino community.

These partnerships and positive relationships have led to a large pool of applicants for the past several years. For many families, kindergarten may be a parent's first exposure to the public school system, and the recruitment strategy for KALE will continue to rely on word-of-mouth recruitment as well as targeted outreach to families with children entering school for the first time. KALE staff will employ several strategies to inform as many families in Lynn as possible about the opportunity to attend a KIPP elementary school, including but not limited to:

- Attending and participating in community events;
- Dropping information packets and applications at local businesses, community organizations, and places of worship serving the targeted populations that KIPP aims to serve in an effort to closely mirror the demographics of the Lynn Public Schools;
- Personally handing out information and application to residents with young children in their families;
- Providing applications and information about KALE in multiple languages to daycare centers and pre-K schools across the city; and
- Encouraging parents of current 5-12 students to enroll their elementary-aged children and spread the word about KIPP to friends with elementary-aged children.

Upon enrollment at KALE, KIPP will remain committed to retaining its students through 12th grade, as we believe a K-12 KIPP education will provide students the best possible opportunity to enroll in and graduate from college. Our retention strategy involves fostering meaningful relationships with our kids and families. Each student is assigned an advisor who serves as the family's point of contact. The small group advisory is an opportunity for peer engagement in a small setting and gives the advisor a unique opportunity to engage with the student outside of the classroom. Advisors contact families on a weekly basis to check in, and KIPP conducts quarterly family nights where students have the opportunity to showcase their work and connect their families with the school. Each summer, teachers and staff conduct home visits to form strong relationships with new-to-KIPP students and families and build the foundation of family engagement that has, year after year, contributed to a student retention rate of 95% or higher. Retaining students at KIPP for the duration of their academic careers from kindergarten through high school will have an everlasting impact on their life outcomes. Based on our internal measures of college completion (GPA and ACT scores), we anticipate that a K-12 feeder pattern of schools will increase college graduation rates by 15-20%. As described further in sections 2.4 and 6.5, KIPP systematically builds strong relationships with families, creates a joyful school culture alongside high expectations for academics and character, and provides all students the supports they need to be successful at KIPP, in college, and in life.

2.4 Trends: Attendance, Retention, Attrition, In- and Out-of-School Suspension, Graduation, Drop-outs – *Explain trends and/or abnormalities in attendance, retention, attrition, in-school suspension rates, out-of-school suspension rates, and if applicable, graduation and dropout data over the past four years. The Department performs a review using available student data in the aggregate, and by targeted subgroups, and using the CHART*

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tool. Schools should explain any unique circumstances related to published school data, and corrective actions taken to address challenges in any of these areas of school performance.

KIPP Academy Lynn’s attrition has not only been well below the statewide average but among the best in the state over the last four years. We attribute this success to several factors: we believe keeping our kids is an essential part of success as an organization, we systematically create strong relationships with students and families, and we build a joyful school culture alongside high expectations for academics and character that makes our schools a place kids want to be:

Student Attrition (%)

School Name	Grades	2010	2011	2012	2013	2014
KIPP Academy Lynn Charter School (05-10) - Lynn - Est. 2004	5-11	5	2.9	6.8	5.4	4.6
Statewide Average		8.7	8.7	8.7	8.8	8.2
Median		15.1	10.8	11.4	9.6	11.1
First Quartile		9.6	7.9	7.2	6.1	8.4

The evidence of this intentional approach to school culture and family and student engagement is also evident in our attendance data. We have consistently remained well above the state average for attendance:

Average Daily Attendance (%)

School Name	Grades	2009	2010	2011	2012
KIPP Academy Lynn Charter School (05-10) - Lynn - Est. 2004	5-11	97.5	97.3	98.3	97.1
Statewide Average		94.6	94.6	94.7	94.9
Median		94.8	94.8	94.7	95.3
First Quartile		93.3	93.6	93.7	93.8

Our suspension data reflects the strength of our school culture and the emphasis on keeping kids in school whenever possible. The slight uptick in 2012 is due to increased use of suspension with a small subset of high school students:

Suspension Rates (%)

School Name	Grades	2009	2010	2011	2012
KIPP Academy Lynn Charter School (05-10) - Lynn - Est. 2004	5-11	0	0	0	0.4
Statewide Average		5.3	6	5.6	5.4
Median		4.7	6.0	5.6	4.6
First Quartile		2.0	3.8	4.0	2.5

We do not have graduation or dropout data to report as our high school is still growing out to scale and we have not had students drop out.

2.5 Charts: Past and Proposed Enrollment – Indicate, in a table, both the historical distribution of enrolled students in the present grade span, and the projected distribution of students by grade, including the primary entry points for new students, and the grades where backfilling will occur. To strengthen a request to increase enrollment, the Department strongly encourages schools to increase access and admission of new students at as many grade levels as possible. The table should reflect the implementation timeline, projecting a five year

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enrollment pattern, or more if necessary, to project the maximum enrollment and/or grade span requested. In your projection, indicate clearly the potential for variation in enrollment to safeguard against the need for a future minor amendment if granted.

Currently, KIPP Academy Lynn Charter School holds a charter to serve grades 5-12 for a maximum enrollment of 850 seats, all of which are pre-enrolled to be filled in FY15. Now, to reach grades K-12 and serve more students, KALCS is requesting two amendment changes to its existing charter: an increase in the enrollment of its current grades (5-12), and the addition of new grades (K-4). We seek to add elementary grades in order to both respond to community demand and fulfill the KIPP model of serving students in grades K-12, which, along with our alumni support services, best prepares students for college and career readiness. We seek to expand enrollment of our existing middle and high school grades in order to reach more students, to respond to demand from families evidenced by our long waitlists for existing grades (508 students), to accommodate students from elementary grades, and to fully leverage the human, financial, and facility resources we can deploy to support our schools while still achieving high quality outcomes.

From our currently approved 850 seats for grades 5-12, we are requesting an increase of 736 seats to reach a total of 1,586 seats for K-12. Of the 736 additional seats, 600 are requested for elementary grades K-4 and 136 seats are requested to increase the size of existing middle and high school grades 5-12. The number of seats requested is summarized below.

Grades	Currently Approved	New Seats Requested	Total Seats Requested
K-4 (new)	0	600	600
5-12 (existing)	850	136	986
K-12 Total	850	736	1,586

Seat Availability: We understand that there are a significant number of charter seats available for this request in Lynn below the charter cap, as indicated in DESE’s most recent enrollment report. KIPP is currently the only operator in Lynn with no other new charter applications currently under consideration. We understand that currently there are 1867 seats projected to be available in FY17 under the 18% cap available to proven providers, and 1720 seats available to be awarded under the Max NSS (Net School Spending). If KIPP were awarded the requested 736 additional seats for K-12 expansion and as long as Lynn remains a cap lift district, then some 984 seats would still be available under the cap of awardable seats under the Max NSS.

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KIPP Lynn Enrollment Projections

The table below shows KALCS' historical distribution of enrolled students in the present grade span (FY05–FY15), and the projected distribution of students by grade from FY16 through full scale by FY19 and FY20.

KIPP Lynn Enrollment	Actual Enrollment (FY05-FY14: Actual, FY15: Pre-Enrollment)											Proposed Enrollment (FY16 through Scale)					
	FY05	FY06	FY07	FY08	FY09	FY10	FY11	FY12	FY13	FY14	FY15	FY16	FY17	FY18	FY19	FY20	
	Kindergarten												120	120	120	120	120
1st Grade													120	120	120	120	120
2nd Grade														120	120	120	120
3rd Grade															120	120	120
4th Grade																120	120
TOTAL K-4	0	0	0	0	0	0	0	0	0	0	0	120	240	360	480	600	
5th Grade	77	81	94	93	93	100	100	100	112	112	120	128	128	128	128	128	
6th Grade	0	72	79	88	95	94	100	93	100	112	120	128	128	128	128	128	
7th Grade	0	0	58	70	80	87	86	95	100	100	120	128	128	128	128	128	
8th Grade	0	0	0	53	59	71	84	82	92	100	96	128	128	128	128	128	
TOTAL 5-8	77	153	231	304	327	352	370	370	404	424	456	512	512	512	512	512	
9th Grade								96	90	112	96	112	120	120	120	120	
10th Grade									92	93	112	112	120	120	120	120	
11th Grade										94	93	110	110	118	118	118	
12th Grade											93	91	106	108	116	116	
TOTAL 9-12	0	0	0	0	0	0	0	96	182	299	394	425	456	466	474	474	
TOTAL K-12	77	153	231	304	327	352	370	466	586	723	850	1075	1208	1338	1466	1586	

Grade & Class Sizes: Informed by our strategy for the full K-12 feeder pattern, the proposed sizes of grades in elementary, middle, and high vary at each level based primarily on our determinations of what is most effective for achieving student outcomes and a strong school culture at each level, within our goals and constraints regarding financial sustainability and facilities space. KALCS is planning and requesting enrollment for elementary grades K-4 of up to 120 students, (5 sections x 24 students), middle grades 5-8 of up to 128 students (4 sections x 32 students), and high school grades 9-12 starting at up to 120 students in grades 9 and 10, then dropping through modest attrition to 118 in 11th and 116 in 12th.

Entry Points & Backfilling: Once all K-12 grades are enrolled at scale, the primary entry point for entire grades of new students would be Kindergarten. Although KIPP has a track record of low student attrition, we would continue to maximize access where possible and backfill all available seats in every grade K-10. Given the larger projected middle grades (128) compared to elementary grades (120), KIPP would plan for a somewhat larger entry points in grade 5. Regarding the entry point at high school, to date we have had high percentages of KIPP's advancing 8th graders and their families choose to continue at KIPP Lynn for high school. With that said and although we seek to

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keep all students, we also have a pattern of a moderate number of advancing 8th graders and their families taking opportunities to attend private high schools and we support those choices. For this reason and for other typical attrition reasons such as family moves, we expect higher attrition – somewhat more than 8 students or 6% – from 8th grade to 9th grade than for our other grade transitions. This will allow us to “downsize” seats per grade from 128 in 8th to 120 in 9th, while still expecting to have some seats to backfill in 9th grade. Because like 9th grade, our 10th grade is also projected at 120 students and we may have some small attrition from 9th to 10th, we still expect to backfill a small number of seats in 10th grade. (KIPP would not backfill grades 11 or 12 given the difficulty of integrating new students during upper grades of high school and with college and career process already underway, though we would continue to report on college graduation outcomes for all students who are with us in 8th grade.)

Potential for Variation in Enrollment: KIPP has prepared for variation in enrollment by projecting and requesting the maximum number of seats we expect to fill, knowing that in some grades in some years we may fill slightly fewer seats than projected above. Although we seek to serve as many students as possible and support access to students and families, the total 1,586 seats requested in this amendment includes approximately 5 seats per grade on average (or 64 seats total) which we could potential not fill in a given year and still meet our overall educational, operational, and financial model. This approach of requesting the maximum number of seats projected will safeguard against KIPP needing to submit minor amendments for moderate changes in actual enrollment each year.

2.6 Enrollment Policy – *Submit a draft enrollment policy and application for admission. To strengthen a request to increase enrollment, the Department strongly encourages schools to increase access and admission of new students at as many grade levels as possible. [If granted, the school must amend its enrollment policy and application for admission and receive Commissioner approval prior to implementation].*

Please refer to Appendix A for KIPP Academy Lynn’s proposed enrollment policy.

3: Compliance [Optional]

Schools may choose to summarize briefly within their request the school’s record of compliance with the terms of its charter and applicable state and federal laws and regulations over the past four years, both in reference to school and board operations. Indicate in the summary any corrective action taken in response to challenges, and the implementation of any safeguards to maintain compliance with all legal requirements. The summary should provide additional context to any recent circumstances in the school’s history involving these areas of the school’s performance.

KIPP Academy Lynn Charter Schools has re-prioritized compliance as an area for improvement in response to DESE feedback. We are committed to fulfilling the terms of our charter and complying fully with all state and federal laws, regulations, and requirements, while maintaining a responsive and communicative relationship with the DESE. KALCS has taken several concrete steps to maintain updated knowledge of requirements, heighten organizational awareness, and ensure accountability and execution at the Board, senior management, and staff levels. For example, changes include:

- Adding Compliance as a formal responsibility of the Board Governance Committee, including the regular review of staff-prepared Compliance Reports summarizing progress on compliance priorities and highlighting upcoming compliance deadlines and deliverables.

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- Inclusion of Compliance Reports in every full Board meeting materials package, with the opportunity to ask questions or give feedback at every board meeting.
- Restructuring of Regional Office staff assigned to manage, monitor, and support compliance across our network of schools and clarifying roles and responsibilities of school-based staff.
- Strengthening compliance tracking systems, tools, and trainings to support execution of deliverables and requirements at the school staff level.

In 2014, the MA DESE enacted three renewal conditions that KALCS was required to complete in order to renew its charter and for the DESE to review this expansion amendment request. Conditions included the submission of minor amendments regarding changes to school schedules (complete), having the Board complete training on Open Meeting Law requirements to ensure its committees are in full compliance (complete), and ensuring all ELL Teachers are fully qualified and licensed (in process, as discussed with DESE, due date 9/15/14).

4: Dissemination [Optional]

Schools may choose to summarize briefly within their request the school’s efforts to provide innovative models for replication and best practices to other public schools in the district where the charter school is located. The response may also include dissemination to other schools, districts, and organizations beyond the district of location. The summary should provide additional context to any recent circumstances in the school’s history involving these areas of the school’s performance.

KIPP Academy Lynn Charter Schools and all KIPP Massachusetts schools make a concerted effort to share our promising practices and lessons learned with a variety of educators and organizations. We have hosted several hundred visitors this year at our Lynn campus from local traditional and charter public schools. Our teachers, leaders, and regional team have led professional development for organizations such as Teach for America, the Match Teacher Residency, and Building Excellent Schools. In particular we have led dissemination of KIPP:MA’s practices for character education and student engagement. We have shared curriculum and school design resources to all who request them believing that this will improve all schools.

In the coming year we plan to share our work around college matching in a number of settings providing local educators and policy makers access to the lessons learned from thousands of KIPP college-aged alumni across the country. Based on the outcomes of our high school and KIPP high schools nationwide we believe this work could create significant improvements in the college graduation prospects for many first generation college students around the country.

5: Student Performance

5.1 Explanation of Student Academic Performance [Optional] – *The Department will review the school’s academic performance based on available MCAS data, including student subgroups. Schools should explain any unique circumstances related to published school data, and corrective actions taken to address challenges in any of these areas of school performance within their request. The Department typically reviews the most recent 3 or 4 years of student data, as available.*

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From 2010-2012, KALCS' MCAS results experienced an overall decline. As we transitioned into a charter network and analyzed these gaps we identified a few key causes: lack of consistent instructional leadership especially teacher observation and feedback and lack of systems to collect and analyze data to improve student outcomes. After implementing these changes we saw strong improvement in 2013 and our projected 2014 results continue this trend.

Proficient/Advanced				SGP			
	SY 12 Reading	SY 13 Reading	SY 14 Reading		SY 12 Reading	SY 13 Reading	SY 14 Reading
KAL-8	85%	82%	88%	KAL-8	66%	79%	80.5%
KAL-7	63%	67%	66%	KAL-7	55%	50%	55%
KAL-6	59%	53%	80%	KAL-6	66%	50%	75.5%
KAL-5	50%	67%	65%	KAL-5	50%	76%	71%
KALC-10	NA	94%	96%	KALC-10	NA	54%	63%

While we are excited by the student results, we have embarked on long term planning to deepen and sustain excellent growth through the K-12 experience of a KIPP student. Our multi-year imperatives include aligning K-12 curriculum and sharpening instructional design so all students spend more time with eyes on text and engaging in rigorous problem-solving while receiving the interventions they need to catch up or accelerate.

5.2 Non-MCAS Performance Data [Optional] – *Schools may submit student performance data for other standardized assessments in English Language Arts and mathematics as additional evidence of academic student achievement. Please indicate and define the metric used in your submission. Schools are required to submit at least three years of data for all students and on or more targeted subgroups. Targeted subgroups may include but are not limited to students with disabilities; students who qualify for free or reduced price lunch; and English language learners. If the number of students in one or more targeted subgroups is below the threshold of students required for reporting based on the metric, schools may include a high needs student subgroup where student data is aggregated into a ‘super’ subgroup of students with high needs adjusted for enrollment.*

As part of the KIPP network KIPP Academy Lynn students take the MAP (Measures of Academic Progress) assessment. This is a national assessment that helps us assess students’ yearly growth as well as how well they are tracking towards success on college admissions tests. While MAP establishes goals for typical growth during the academic year, KIPP Massachusetts also tracks our more ambitious “UMASS ready” measures. These goals spell out the annual growth a student entering in bottom quartile of academic performance needs to achieve in order to be on track to an ACT score of 24 or higher (the minimal ACT needed for admission in UMASS Amherst-a public university with high graduation rates).

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Subject	National Average for students meeting or exceeding typical growth	SY 13 KIPP Average for students meeting or exceeding typical growth	SY 13 % of students meeting or exceeding typical fall:spring MAP growth targets	SY 13 % of students meeting or exceeding UMASS ready tiered fall:spring MAP growth targets	SY14 % of students meeting or exceeding typical fall:spring MAP growth targets	SY 14 % of students meeting or exceeding UMASS ready tiered fall:spring MAP growth targets
Reading	50%	65%	76%	63%	78%	61%
Math	50%	70%	79%	62%	88%	75%

As indicated in the table, in the last year our students had strong typical growth in reading and exceptional growth in math. This continued a trend where KIPP Massachusetts not only performed well above the national average but also above the KIPP network average. Our ELL students outperformed our non-ELL students in the percentage of students making typical growth. Our students on IEPs did not achieve their growth goals at the same rate as their peers without IEPs. As a result of analysis of all these results we believe that there is an opportunity to increase the percentage of students achieving UMASS ready by improving the rigor of our instruction and the targeting of our intervention.

6: Program Delivery

6.1 Curriculum Alignment – *Briefly describe the process that is used to align curriculum to the Massachusetts curriculum frameworks. Include in your response the processes used to align curriculum to the 2011 Mathematics and English Language Arts curriculum frameworks incorporating the Common Core State Standards, and to incorporate the World-class Design and Assessment English Language Development (WIDA ELD) standards into content area curricula as an example of prior effective implementation.*

Alignment of KIPP Academy Lynn Elementary curriculum with the Massachusetts Curriculum Frameworks will be based on the alignment of the curriculum for KIPP Academy Boston Elementary with the Massachusetts Curriculum Frameworks. During the 2013-2014 school year, KABE leaders built the foundation for the curriculum for KIPP Academy Boston Elementary school set to open for the 2014-2015 school year. Leaders started by mapping out the MA Common Core State Standards for K-4 as a skeleton for the curriculum and built on the work of high performing charter schools in Massachusetts, including Edward Brooke. They started by building rigorous assessments based on the Massachusetts Curriculum Frameworks (MCF). Then, using those assessments and the MCF, leaders designed year-long scope and sequences. Teachers will have the autonomy and time during summer professional development to develop long term and unit plans. Just like teachers at KAL, KALC, and KAB, teachers at KALE will work together to incorporate the World Class Instructional Design and Assessment (WIDA) standards for English Language Learners into their plans. They will have support from their instructional coaches, an ELL teacher, and our Director of Special Education and ELL, and will be given models from other KIPP schools and high performing Massachusetts charter schools as examples of successful practices from which we will “borrow to build” for KALE’s curriculum. As KIPP is a nation-wide network of 141 schools, we have high quality examples of readily available elementary curriculum at our fingertips. Once we have identified the most effective

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practices from other schools, we will determine if and how these practices fit in with the Massachusetts Curriculum Frameworks.

Teachers will spend a minimum of five days refining long term plans and unit plans during the summer and will have the option of creating their own plans or building off of existing ones that have proven to create significant student achievement and growth. During summer professional development, teachers will be given a scope and sequence that they can review and give input. Then, teachers will build on the units of study and lesson plans created by teachers at KIPP Academy Boston Elementary. At every level of the planning process, teachers will be required to reference the specific standards that align to their unit and lesson. Throughout the school year, teachers will have ongoing support from their instructional coaches and grade level teams to develop the most rigorous unit and lesson plans.

All teachers also have access to KIPP Share, an online platform that houses thousands of unit plans and lesson resources from all of the 141 KIPP schools nation-wide. During the school year, teachers will be grouped by grade and plan regularly in weekly team meetings to share ideas for teaching specific objectives that are aligned with the Massachusetts Curriculum Frameworks. In these weekly meetings, they will rehearse specific lessons, give and get peer feedback, and discuss strategies to meet the needs of individual students. As described above, teachers will also meet with their coaches on a weekly basis throughout the school year to review lesson plans and receive feedback. Together, teachers and coaches will also analyze student work and data regularly to make sure that students at all levels will be challenged and work will be rigorous and differentiated to meet the needs of the diverse population that includes English Language Learners and Special Education students. Coaches will pay particular attention to alignment to standards as well as the depth and rigor of the content.

Additionally, the instructional leadership team will hold regular team meetings that will include all of the coaches and the principal. The purpose of these meetings will be not only to help the coaches become better coaches, but also to look at both internal and external examples of curricular alignment, data analysis, and observations and feedback and incorporate best practices into the KALE curriculum.

6.2 Curriculum Evaluation – *Describe the process and procedures used to evaluate whether curriculum and instruction is effective and successfully implemented. Include in your response a brief summary of the assessment system implemented at the school, and any modifications if the request is granted.*

At KIPP Academy Lynn Charter Schools, we believe that the best way to measure the effectiveness of our curriculum is to measure its impact on the academic achievement of our students. Our regional leadership team developed long term academic readiness outcomes that if met, would result in 75% of our students graduating from college. At KIPP Academy Lynn Elementary, we will use a wide variety of data to make decisions about the effectiveness of our curriculum and instructional strategies, to make sure our students are making the necessary growth to be on track to achieve our long-term outcomes.

The Director of Student Growth and Achievement will compile data and provide reports to school leaders for analysis. School leaders (principals and assistant principals) will work with teachers to analyze the data during scheduled meetings following each interim assessment and develop action plans for re-teaching, remediation, and extension. Data will be used throughout the course of the year to evaluate the curriculum’s effectiveness and make changes where necessary. If we find that at any point we’re not meeting or exceeding our goals for student

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achievement, we will refine our teaching and remediation strategies on an ongoing basis throughout the school year, and at the end of the school year, professional development days will be designated to modify and improve upon long term plans regarding the curriculum's implementation.

Student Data

Beginning in school year 2012/13 (the year KIPP Academy Boston was founded), KAB and KAL teachers jointly administered common assessments to fifth and sixth graders in reading and writing. Common math assessments will begin in the 2014-2015 school year. Teachers from both schools planned lessons together, observed each other teaching, and evaluated the data from the assessments together. This shared practice strategy will be replicated with teachers at KIPP Academy Boston Elementary and KIPP Academy Lynn Elementary.

Based on the results of other high performing KIPP elementary schools like KIPP Raices Academy in Los Angeles, we believe that by the end of the fourth grade, 85-90% of students should be reading at or above grade level.

According to the Fountas and Pinnell reading assessment, less than 2% of KAL's most recent class of entering fifth graders arrived on grade level. Like KAB, KAL, and KALC, KALE will use interim assessments, PARCC, Measured Academic Performance (MAP), and either Fountas and Pinnell or the Strategic Teaching and Evaluation of Progress (STEP) tests to gauge student progress. In addition to these measures, teachers will give exit tickets (quick end-of-lesson assessments to gauge objective mastery) in grades 1-4 and weekly and unit quizzes as appropriate.

Interim Assessments: Interim assessments at KALE will occur in grade one in math and reading, and in grades 2-4 in math, reading, and science. In kindergarten, we will use a one on one math assessment. In all grades K-4 we will administer writing benchmark assessments that will be scored using a common rubric based on the Common Core. These assessments occur three times per year and will be created by teachers to align with the Massachusetts Curriculum Frameworks. Data from interim assessments will be used by teachers to inform re-teaching, grouping, and sharing of effective practices across our teams and our schools to ensure that all students are reaching appropriate academic benchmarks.

PARCC or MCAS: KIPP:MA has elected to administer the PARCC exam in 2014-2015. In line with state regulations, the PARCC exam will be administered in the spring of each school year to students in the 3rd grade, and results will be used as a partial measure of student achievement and to help inform the school's ongoing development. Teachers will refer to the PARCC item bank to create internal assessments which will expose students to the type of questions they will encounter when taking the actual PARCC exam.

Measured Academic Progress (MAP): In addition to interim assessments, we will also administer the nationally-normed MAP test twice per year. This assessment is taken by all students at all KIPP schools and used to directly compare KIPP Academy Lynn's student progress to other KIPP schools across the country.

We will use this data to track student growth towards college readiness, to make sure all of our students, regardless of their starting point, are progressing, and also to make curricular decisions. As the MAP assessment correlates to ACT scores, it enables KIPP teachers to project how well a student will do on the ACT based on their performance on the MAP test, even though the test is taken in elementary and middle school.

MAP results allow KIPP teachers and leaders to determine whether students are making the type of progress they should be in order to be academically prepared to succeed in college.

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Additional Reading Assessment: The emphasis on literacy at KALE will lead us to use either the Fountas and Pinnell assessment or the STEP (Strategic Teaching and Evaluation of Progress) assessment. Research-based assessments such as these will be administered three times per year to all students and will provide more information on our students as readers, including comprehension, vocabulary, reading strategies, and phonemic awareness. Additionally, informal reading assessments will be administered bi-weekly to gauge student progress throughout the year.

Other Key Data Sources

Although student data is extremely useful in determining whether KIPP’s curriculum is resulting in our desired academic outcomes, we recognize that it is important that not only the curriculum content is effective but also the implementation. At KIPP, we believe in the importance of observing teachers in a structured, regular manner to determine the effectiveness of the curriculum’s implementation. KALE’s model of teacher observations and coaching will follow the rest of KIPP Academy Lynn, and similarly, KALE will also utilize the KIPP Healthy Schools Survey to inform how we communicate with families.

Teacher Observations and Coaching: KALE will use the national KIPP Framework for Excellent Teaching (KFET) a tool developed and utilized across KIPP nationally to support the coaching of teachers. The framework includes a common language for planning, execution and implementation of curriculum. Just as they are at KIPP Academy Lynn middle and high schools, teachers at KIPP Academy Lynn Elementary will be developed through regular observation, planning, and data conferences to ensure every student receives the extra support or challenge that s/he needs to grow and thrive. Teachers will be observed 15-20 times per year by their coaches, and each teacher will meet weekly to debrief observations, plan future lessons, and analyze student assessments and results in an effort to ensure that the KIPP curriculum is being implemented effectively.

KIPP Healthy Schools Survey: The KIPP Healthy Schools Survey was created by the KIPP Foundation to obtain valuable input from families, teachers, and school leaders. Through this survey, KALE families will provide input on whether or not KALE is meeting the needs of their child and family. As a point of reference; on the 2013-2014 survey, 87% of parents at KIPP Academy Lynn (KAL) and 86% of parents at KIPP Academy Lynn Collegiate (KALC) reported that they were satisfied with the overall quality of their child’s education at KIPP.

School Reviews: In addition to the data points described above, all KIPP:MA schools participate in internal school reviews conducted by members of the Instructional leadership team (Executive Director, Director of Teaching and Learning, Director of Leadership Development, Director of Student Growth and Achievement, and the Director of Special Education) . These school reviews provide an opportunity to look at student achievement data as well as observational and interview data in order to both determine what is working well and identify areas of opportunity. In addition to these internal school reviews, KIPP Academy Lynn Elementary School will be reviewed by a team from the KIPP Foundation in its first year of operation.

6.3 Curriculum Development and Implementation, New Grade Span – Describe the process used to develop curriculum for the new grade span and a timeline for curriculum development and implementation, if applicable, including the individuals involved.

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KIPP Academy Lynn Elementary will leverage the same model to create its curricula used by all KIPP:MA schools. KIPP continuously strives to develop a model that effectively balances standardization, efficiency, and teacher autonomy. This model will be refined to meet the academic and developmental needs of students in grades K-4.

Over the course of 2013-2014, KIPP Academy Boston underwent a planning year for the opening of KIPP Academy Boston Elementary in SY2014/15. As they have just completed the curriculum development process themselves, leaders for KABE will work closely alongside future leaders for KALE to develop curriculum and select assessments and resources. In preparation for opening KALE (pending DESE approval), a school leader has been identified and is going through a rigorous training program that includes regular meetings with KABE’s Founder and other instructional leaders in the KIPP:MA region to leverage best practices in designing KALE’s curriculum development process.

As part of the planning and training program, school leaders visit high performing KIPP elementary schools across the country as well as successful Massachusetts elementary schools. The purpose of the visits is to study and learn from current successful schools. This team of leaders makes critical decisions about curriculum including how teachers should plan, goals for each grade level, what structures need to be in place, and what resources must be provided. Then, the team fleshes out a scope and sequence and units under the guidance of the principal as well as KIPP Massachusetts regional leadership.

During the 2014-2015 school year, KABE curriculum and implementation will be refined. Also during this year, KALE founding staff will be hired, and planning will leverage the work and lessons learned by KABE teachers to continue to develop and refine lessons and curriculum.

Just as in KIPP Academy Lynn Charter Schools’ middle and high schools, KAL and KALC, the KIPP Academy Lynn Elementary Founding Principal will be supported by the KIPP Massachusetts instructional team, including the Director of Teaching and Learning, Director of Leadership Development, Executive Director, the Director of Student Growth and Achievement, and the Director of Special Education.

6.4 Curriculum Scope and Sequence, New Grade Span – *Provide an outline of the curriculum scope and sequence that will be used in the new grade levels, including the content and skills to be taught in the core content areas at each new grade level, if applicable.*

Sample K-4 Curriculum Outline

Kindergarten	
Subject	Examples of Skills and Content
ELA	<ul style="list-style-type: none"> • Identify the main characters in a story • Explain the difference between fiction and non-fiction texts • Produce rhyming words • Write a story in the order the events happened • Capitalize the first word in a sentence • Ask questions in order to get help

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Social Studies	<ul style="list-style-type: none"> • Tell about the different jobs people have in our school • Explain why we have rules in our classrooms and school
Math	<ul style="list-style-type: none"> • Demonstrate one-to-one correspondence when counting 50 objects • Use manipulatives to model single digit addition and subtraction problems
Science	<ul style="list-style-type: none"> • Compare the weather charts from different times of the year to draw conclusions about seasons • Recognize that animals are living things that grow, reproduce, and need food, air, and water

First Grade

Subject	Examples of Skills and Content
ELA	<ul style="list-style-type: none"> • Identify words in a poem that suggest feeling • Use headings to locate information efficiently • Substitute the initial sounds of multi-syllabic words containing medial digraphs with initial blends to create new words (dashing – smashing) • In narrative, opinion, and informative texts, write a clear ending that brings closure to the piece • Use commas to separate single words in a series • Use “I agree” and “I disagree” to respond to a peer’s thoughts and ideas
Social Studies	<ul style="list-style-type: none"> • Describe places in the school using cardinal directions • Create a timeline (in chronological order) that shows important events from students’ lives
Math	<ul style="list-style-type: none"> • Evaluate whether an equation involving single digit addition is true or false • Represent numbers up to 99 in at least two different ways (picture, written numeral, expression)
Science	<ul style="list-style-type: none"> • Recognize how trees change in Lynn throughout the seasons and explain why this happens • Create a way to balance two objects

Second Grade

Subject	Examples of Skills and Content
ELA	<ul style="list-style-type: none"> • Compare and contrast two different versions of the same story • Identify the main idea in a paragraph • Decode words with the prefixes un-, dis-, and re-, and use the prefix to help determine the meaning of the word • In informative texts, use relevant facts to help make key points • Use a digital dictionary to check the meaning of an unknown word and check spelling • Take turns speaking in a group (without adult facilitation)
Social Studies	<ul style="list-style-type: none"> • Explain the difference between continents and countries • Describe two notable scientists from their community and their contributions
Math	<ul style="list-style-type: none"> • Skip count by 100 to 1,000 • Estimate the length of two objects using inches
Science	<ul style="list-style-type: none"> • Describe and compare the physical properties of matter • Compare the life cycle of a plant to the life cycle of a butterfly

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Third Grade

Subject	Examples of Skills and Content
ELA	<ul style="list-style-type: none"> Describe the motivation of a character based on evidence from the text Determine the main idea of a text Use expression when reading dialogue in a text In opinion and informative pieces, write a concluding paragraph Use quotation marks when writing dialogue Ask peers clarifying questions in order to further their understanding
Social Studies	<ul style="list-style-type: none"> Compare and contrast a current map of Lynn to a map of Lynn from the 1800s Identify at least three functions of government
Math	<ul style="list-style-type: none"> Round whole numbers to the nearest 100 and explain their thought process Explain why multiplication is an efficient way of figuring out the area of a rectangle
Science	<ul style="list-style-type: none"> Generate research questions about the relationship between outside temperature and other factors Describe what happens to water when it freezes

Fourth Grade

Subject	Examples of Skills and Content
ELA	<ul style="list-style-type: none"> Define first person and third person narration Use context clues to determine the meaning of an unknown word Use context to help read unfamiliar multisyllabic words accurately Identify and include the most compelling facts in an informative piece of writing Identify and correct fragments and run-ons Paraphrase parts of a text read aloud
Social Studies	<ul style="list-style-type: none"> Identify at least three natural resources in the United States and explain how they are used Describe the significance of Faneuil Hall
Math	<ul style="list-style-type: none"> Compare two fractions with different denominators using a benchmark fraction Identify which two-dimensional figures have parallel lines
Science	<ul style="list-style-type: none"> Explain how the rate of vibration correlates to pitch Identify at least three examples of how an organism changed its environment to survive

6.5 Supports for English Language Learners, Students with Disabilities, etc. – *Briefly describe the supports provided to meet the academic needs of all students, including but not limited to students with disabilities, and English language learners. Indicate how the strategies may need to evolve during implementation of the proposed expansion.*

At KALE we whole-heartedly agree with George Evans when he says, “Every student can learn, just not on the same day or in the same way.” We also know that students at all performance levels will struggle at some point and

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it is critical to all stakeholders that there are options in place to provide extra supports as needed. While the needs of students who are facing challenges will be considered on a case-by-case basis in accordance with the student's IEP or 504 plan, some of the readily available interventions and supports could include:

- Guided reading and/or phonics instruction with higher frequency in a smaller group
- Writing conferences with higher frequency during Writer's Workshop
- Individual conferencing in class, before school, after school, breakfast, snack, or lunch
- Access to a computer-based intervention with an adaptive curriculum such as STMath or iStation

While this list is far from complete and will change as we grow to better know the needs of our children, these are examples of interventions that will be available on a daily basis at KALE that can be provided by a classroom teacher, teaching fellow, learning specialist, or ELL specialist. Student progress toward grade-level benchmarks will be assessed at a minimum of once per quarter and at least twice that frequently for students who are at risk for not meeting the goals. As part of our data analysis process, leaders at KALE will employ a Response to Intervention model. This process will be led by our Special Education Coordinator, and overseen by the Director of Special Education and ELL. For students who are not currently on track, parents, teachers, and administrators (as necessary) will meet at least twice per quarter to discuss the struggles the child is facing, the interventions in place at the time, the impact of the interventions, and whether they continue to be sufficient (or necessary). The team will agree on the interventions to be used for the next cycle and will set the next meeting to evaluate the student's progress. The "formal" check-ins will happen approximately once per month and progress will be monitored and shared with parents during this time.

As we get to know the families and students we will serve, we will adjust our strategies to meet their needs. For example, if we have a significant number of students who need math support in a particular grade, we may adjust our school schedule to provide more adults who can provide targeted math instruction at that time. Students will spend significant portions of the day working in both heterogeneous and homogeneous arrangements so they can receive the support and individualized attention they need to succeed. For example, reading classes will include instruction and practice with grade level texts followed by guided reading groups and phonics groups where students will read at their individual instructional level. These groupings will be flexible. As a student improves his or her fluency, she will change into a new guided reading group. This flexibility in groupings will allow us to quickly and efficiently respond to the needs of our students.

7: Culture and Family Engagement

7.1 Strategies and Supports: Physical, Social, Emotional, and Health Needs – *Briefly describe the strategies used to create a safe school environment, and to address the physical, social, emotional, and health needs of your students. Indicate how the strategies may need to evolve during implementation of the proposed expansion.*

The vision of school culture at KALE is that our youngest KIPPsters understand and follow expectations in many different settings, doing the right thing because they expect the best of themselves and their school community. In Kindergarten, this means they use safe bodies and kind words, following directions without disagreement. In second grade, it means that students mediate their own conflicts and choose their own consequences (with adult input and consistent with our discipline policy), connecting actions to outcomes. By fourth grade, this means that students create their own community compact and self-assess each day how they're living up to the commitments

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they made. Teachers will monitor how the intended culture is actualized through focused observations called Culture Walks. As a tool for this we will modify our School Culture rubric that we use in our middle schools. The high expectations for school culture at KALE will be no different than that at the middle and high school levels; it will simply be modified to match the developmental levels of students in grades K-4.

Students at KIPP Academy Lynn Elementary will ultimately control their destinies through their choices, and guided practice of self-regulation at a young age which will shift them from external compliance to internal empowerment. Each child *and adult* in our building will have an awareness and feeling of responsibility for himself or herself and those around them. This care for and pride in themselves and their surroundings – school, the campus, town, state, world – will build towards adults who live intentionally to better themselves and their community.

Entering the school year, teachers will provide feedback to students about how they are living the values through daily behavior charts that families check and sign off on each evening. Teachers will have primary responsibility for positive and negative consequences, offering reinforcing or adjusting feedback when they feel it is appropriate. Any teacher may give feedback to a child, but communication of concerns for a student must be channeled to her or his family by the homeroom teacher so that families hear one consistent voice. The school leader will be made aware of student behavior and progress during summer school at wrap-up meetings; she will communicate with families as well but will always discuss/notify that communication with the child's homeroom teacher. Teachers will be encouraged during summer professional development to handle classroom management challenges on their own as much as possible, but extreme behaviors (violence, defiance) or repeated concerns (more than two time outs) will be referred to the school leader. The school leader will remove a child from the room only if the child is a threat to others' safety or as a last resort for repeated unacceptable behavior. Even when the school leader intervenes, the homeroom teacher will take responsibility to follow up with the student, school leader, and student's family on the same day.

In creating a school culture where students believe that they *can* and act upon that belief with care, our school will teach our values in one of KIPP's founders, Dave Levin's, recommended ways:

1. *Believe It and Model It*: hiring for beliefs and mindsets; school leader living it; practicing during summer PD so that teachers consistently use language and actions that embody our values
2. *Name It*: intentionally discussing anchor texts and connecting those characters to ourselves and future book characters during the year; teaching songs, chants, poems about our values so we repeat the message joyfully and often
3. *Find It*: sharing anchor texts during summer school in which book characters model the motivations and behaviors we seek
4. *Feel It*: student of the week awards, care and can points that add up to incentives like field lessons, extra read aloud, song/dance of choice
5. *Integrate It*: frame the weekly memo with it; explain behavior management conversations with students in terms of values (I need you to keep your hands to yourself, because when you swing them they hit your friend. Does that show care? How could you show care with your hands right now?)
6. *Praise It*: During orientation and throughout the year in shout-outs using the values; using values language in daily behavior reports (two circles that can become smiley faces with box for comments that begin with "I showed I cared today by... I showed I can today by..."); praising students of the week using values language.

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At KIPP:MA, there is a region-wide belief that the success of the individual and the success of the community are tied together in what Dr. Martin Luther King Jr. referred to as “the fabric of inescapable mutuality.” All students, including our youngest KIPPsters will learn about helping themselves and others through academic group and partner work and teacher-created culture lessons with anchor texts to emphasize our values.

To support students’ emotional and social health, there will be a full-time counselor, starting in year 1. The counselor will provide direct support to students and communicate strategies with parents and teachers. The counselor will also help design key opportunities for building social skills as part of our curriculum. For example, the counselor may identify specific ways we can structure recess that will help build problem solving skills. We will also employ a nurse who will provide support and care for any students with health needs.

As we get to know our students, we may modify certain aspects of our design to best support students in all areas of development. For example, if we have several students who would benefit from support with social skills, we may consider providing more social skills groups during the school day. We may also modify some of our activities during class, such as center work, to explicitly teach these skills through academic work and structured play. Overall, through our Response to Intervention process and our behavior tracking system, we will analyze trends in students’ needs in order to provide the most strategic, targeted support and interventions.

7.2 Parent Engagement – *Briefly describe how the school develops strong working relationships with families/guardians in order to support students’ academic progress and social and emotional well-being. Indicate how the strategies may need to evolve during implementation of the proposed expansion.*

At KALE, we believe that that the most meaningful parent engagement comes from ongoing communication about student progress and sharing strategies related to academic, social, and emotional support. Starting before students enter the building, KALE teachers and staff will conduct home visits to start the process of building these relationships with kids and families.

In addition to home visits, KALE will host several family nights over the course of the year. The purpose of these events is to create a sense of community, share strategies, and celebrate student work. For example, KAL had a reading night this year that was designed to help parents identify strategies to support reading at home and open a dialogue between parents and teachers about the struggles of getting students to read for a sustained amount of time in the evenings. At the end of the night, families left with concrete ways to support and encourage reading outside of school, while teachers gained a better understanding of the challenges parents are faced with getting their students to read.

When KALE parents come on campus, they will quickly realize they are not guests. They are family. Not only will they be able to independently locate classrooms, bathrooms, and the cafeteria – they will also know where the classroom’s leveled lending library is, which bins hold the “just right” books for their child, and how many books they should see in the book baggie each night. They will know the teachers by name and know the best way to reach them at any given time. While we know that every family’s schedule comes with unique demands, we aim to provide as many opportunities as possible for parents to be visible and engage meaningfully with our teachers, kids, and each other.

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Parents will always be welcome in the building to observe their kids in action (after schedules and routines are established in the first 10 days of school). However, this does not mean that parents can consistently expect to meet with teachers or school leaders without calling ahead to check on availability. When notified by 10 AM, KALE staff will do all that is possible to accommodate a family’s need to meet by the end of the school day. When this is not possible, the school will work to have a meeting scheduled within 48 hours. When visiting, we will aim to engage parents in the day-to-day operations, deliberately moving them from “guest” to “family”.

Open Door Policy

In order to maximize sacred instructional time, we will provide times that are most ideal for parents to visit. Examples of these times are outlined in the chart below and are open to any parents on any day, requiring no “prior experience” or consistency.

Breakfast with Books	Mon - Fri 7:30 – 8:00	Parents are invited to join all students for breakfast and are encouraged to select and share books from our library during this time. Parents are encouraged to circulate throughout the classroom, spending quality time with all students.
Morning Motivation	Mon - Fri 8:00 – 8:30	Parents are invited to join us for grade-level celebration of our values in action. Parents are strongly encouraged to model zest as we engage in our school songs and chants. With notice, parents may be invited to participate in short value skits.
Lunch & Recess	Mon - Fri 12:15 – 12:45 12:45 – 1:10	Parents who are unable to commit to the regular schedule required for lunch support (see below) are always invited to join their child and his/her teammates for lunch and recess. Parents are welcome to observe recess or engage in play with the children.
Afternoon Reflection	Mon - Fri 4:15 – 4:30	Once students are packed up for dismissal, parents are invited to join the team around the carpet for a recap of academics and to share student-to-student shout-outs for teammates who modeled school values throughout the day. We will end the day joyfully with chants and songs that represent the values. Parents are encouraged to sing loud and proud!

Volunteer Opportunities

Parents will also be invited to volunteer for scheduled roles that require a more consistent commitment and willingness to be trained on the expectations and systems that will keep our children safe and supported. Examples of those options are described in the table below.

Arrival or Dismissal Support	A consistent group of parents (or consistently rotating shifts) who are comfortable enforcing normed expectations for students, families, and community members. This group of parents must be equipped to remain calm and communicate with school staff immediately in the event that a community member is upset about the bus patterns, traffic, etc. This group of parents will have defined roles/zones/posts that are designed to ensure students load buses safely. Pick-ups will be handled by teachers and office staff to ensure the safety of each child. Parents picking up their child use a separate entrance than students who are riding the bus. Still, a staff member will be posted at both exits to ensure that any parent attempting to leave with an adult has followed the proper procedure.	-consistent schedule -prompt -well-versed on expectations -normed on messaging -warm and firm with students -warm and firm with adults
Breakfast & Lunch	A consistent group of parents (or consistently rotating shifts) who bring joy to the cafeteria and are comfortable enforcing behavioral expectations. This group of parents will be asked	-consistent schedule -prompt

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Support	to learn and practice enforceable statements (Love and Logic). Also, we will norm on individual roles/zones during the breakfast and lunch periods to ensure smooth, safe meals. Also, as we are able to build a strong team of parent monitors, we will be able to provide this as part of a sustained collaborative planning period for all instructional staff.	-well-versed in expectations -normed on messaging -willing to play a “role” -warm and firm with students -communicates clearly with staff
Materials	Throughout first quarter, teachers will work to identify tasks that can easily be delegated to parents who are eager to help prepare for day-to-day classroom routines. We will wait until Quarter 2 to invite parents into this role so that systems and routines can be clearly communicated to interested parents.	-consistent schedule -self-directed -attention to detail -works well with other parents -works well with limited space -not seeking engaging with kids

On-Call

Teachers will invite parents to sign up if they wish to be contacted for special projects such as classroom celebrations, field trips, parent-night performances, interactive projects, publishing parties, bulletin board updates, etc. When a project arises, the teacher will have a database of parents to contact who can then evaluate their schedule and passion for the task at hand. Some parents may have the capacity to take the lead on a project while others may ask for a task that can be taken home and completed by a given deadline (e.g. cutting out laminated pictures of students for the new STEP tracker and delivering by the end of the week).

KALE knows that the most valuable partnership we can forge is with our families and is committed to being responsive to feedback and input from parents on an ongoing basis. To that end, like our other schools, KALE will form a Parent Advisory Council to help set the direction and get key input from our families. The leadership team at KALE will also use survey data to assess whether families are satisfied with the level and types of communication and support provided by the school.

8: Capacity

8.1 Implementation: Decision-Making, Communication, Evaluation –*Describe how the staff will implement the request effectively and evaluate its success. Indicate the individuals involved throughout the process of implementation, and the systems in place for decision-making and communication among all members of the school community.*

Track Record & Context: Based on a 10-year track record in Massachusetts, successful growth of already chartered expansion seats, and recent investments in capacity and compliance, KIPP:MA’s staff and Board have the resources, knowledge, and talent necessary to effectively implement the growth of our Lynn charter to serve more students and grades. In 2010, KIPP applied for both an expansion of its Lynn charter to add elementary grades and to add a new charter to found KIPP Boston. At that time, the DESE approved the KIPP Boston application, but not the Lynn elementary request. DESE questioned KIPP’s capacity to manage both aspects of growth and encouraged KIPP to invest further in needed capacities and experience before potentially re-applying for Lynn elementary in the future. In August 2013, KIPP:MA re-submitted its amendment alongside the charter

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renewal application as the FY10-FY14 charter period was ending. DESE responded that, due to KIPP's need to strengthen some areas of compliance, the amendment request should be deferred to the next cycle and that the Lynn charter would be renewed for the FY15-FY19 period with conditions regarding compliance that have been addressed. (Please see Compliance section for details.)

Increased Capacity to Implement: Over the past four years, KIPP has invested substantially in strengthening its capacity to manage growth and execute effectively. This gives us confidence that we can manage the full scope of our upcoming growth to add elementary grades in Lynn, grow the size of middle and high school grades in Lynn, and continue to grow Boston middle and elementary grades. As described further below, these capacity investments stem from four sources:

1. **Strengthened Regional Office Capacities:** Investment in KIPP Massachusetts Regional Office talent (staff and Board), systems, and other resources to support schools in start up, growth, and steady state phases.
2. **Growth Experience:** Expertise gained from successfully opening two new ventures, KIPP Lynn's high school grades and KIPP Academy Boston, including staff based in those schools.
3. **School Leadership Pipeline:** Demonstrated pipeline for developing school leaders to found new schools and grades.
4. **National KIPP Network Resources:** Increased capacity of the national KIPP Foundation and peer KIPP regions from around the country to provide supports and share best practices.

Strengthened Regional Office Capacities:

Over the past 4 years, KIPP Massachusetts has founded a financially sustainable Regional Office to support its multi-school network and has built that team to reach ~27 staff in FY2014 with some additional positions planned during growth through FY2020. Examples of director/manager-level staff added or promoted since December 2010 include:

- **Executive Director – Caleb Dolan**, effectively succeeding founding ED Josh Zoia and bringing 15+ years of K-12 education experience including founding one of KIPP's original schools, growing a KIPP multi-school network in a another state, serving as national developer of school leaders at the KIPP Foundation, and serving as Chief Academic Officer at KIPP:MA.
- **Chief Development Officer – Jennifer Parkos**, 25+ years of nonprofit and business experience in external relations, marketing, public relations, and fundraising, 4+ years at KIPP:MA.
- **Director of Leadership Development – i.e. Deputy Chief Academic Officer, Emily Rodriguez**, 13+ years experience as former elementary school principal, curriculum director, and teacher; 2 years at KIPP:MA
- **Chief Operating Officer – John Kalafatas**, 20+ years of nonprofit, education, and business management experience; 3.5 years at KIPP:MA
- **Director, KIPP Through College (Alumni Support Programs) – Alexis Rosado**, 10 years of nonprofit and education experience; KIPP NY student alumna, 5+ years experience at KIPP:MA.
- **Senior Finance & Regional Operations Director – Jennifer Jewell**, 18+ years of business and nonprofit finance, operations, and public grants management experience; 3 years at KIPP:MA
- **Senior Human Resources & Regional Operations Director –Christina Killizli-Salameh**, 16+ years of nonprofit, business, and charter school operations, finance, human resources, and MA charter compliance experience; 1.5 years at KIPP:MA

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- **Data Director – Stew Stout**, 7+ years experience as former teacher and manager for student data analytics software company; 1 year at KIPP:MA.
- **Technology Manager – Gashmend Gashi**, 12+ years of information technology experience with business, government, and nonprofit organizations; 3 years experience at KIPP:MA
- **Staff Talent Recruitment Director – Ryan McCarthy**, 11+ years experience in nonprofit program, volunteer, and staff recruitment management; 4 years KIPP experience, 1 at KIPP:MA.
- **Special Education Director – Stefanie Perry**; 9+ years experience in special education and high performing charter schools; 1 year at KIPP:MA.
- **Director of Teaching & Learning – Sarah Drezek**; 8+ years experience as a former KIPP teacher and Dean of Instruction in other KIPP states and experience at KIPP:MA as Dean of Instruction for Lynn Middle school grades, 8 years KIPP experience, 1 at KIPP:MA.

Across all educational and operational areas, these new regional managers and the additional staff they hired have added substantial expertise, bandwidth, systems, and practices to KIPP’s capacity to launch, grow, and support schools. These positions create efficiencies at the school level that allow teachers and leaders to focus more time and energy on their schools and students.

- KIPP Massachusetts has built out the regional Teaching and Learning team in the past year so we can continuously improve outcomes for kids and build an aligned K-12 curriculum and instructional design that allows our students achieve the college graduation and life outcomes they deserve. The regional Teaching and Learning team quarterbacks projects like the development of aligned K-12 curriculum and assessment and provides expertise in areas such as data, Special Education, and assessment.
- KIPP Massachusetts invested in a regional talent function for the first time this past year to ensure our school leaders were able to focus their efforts on developing teaching and learning in the building while our region continued to recruit and select the highest quality teachers and staff for our kids and families. The regional talent function was able to hire 54 teachers (almost two times the number we had previously hired) and dramatically increase the number of teachers of color in our system (39% of new hires were people of color, up from 12% the prior year).
- Our regional KIPP Through College (KTC) team is currently focused on KIPP Lynn alumni who did not have the opportunity to attend a KIPP high school or who are pursuing college, identifying learning about college and career readiness that can be backwards planned all the way down to Elementary school. This regional team is focused on forming relationships and support systems at all of the college and universities our KIPPsters currently attend. The future alumni of KIPP Academy Lynn’s elementary grades will benefit tremendously from this work.
- In the area of private fundraising, our now four-member Development team has established a track record of increasing private revenue from approximately \$300,000 per year through SY2009 to \$2-3M per year since then, with a successfully completed \$5M building capital campaign for our Lynn “High Rock” facility and a \$10M region-wide “Growth Capital Campaign” for Lynn and Boston expansion that is already over 74% raised.
- In regional operations, KIPP:MA has bolstered its ability to manage growth and execute school start up plans by investing in operations talent and systems across the areas of finance, facilities, technology, human resources, and compliance. Our Operations Team (regional and school based operations staff) has increased customer satisfaction from 73% when first assessed in FY12 to 95%+,

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as reported through internal quarterly surveys of all staff on their experience of customer service provided by the Operation Team.

Growth Expertise:

Although adding elementary grades will bring unique challenges, KIPP:MA has now gained experience from successfully starting multiple ventures and demonstrated it can do so concurrently. First, we have added new grade levels through the addition of its high school grades in Lynn (9th grade in SY12, 10th SY13), which has been noted around the national network as one of KIPP’s most effective high school openings to date, backed by strong assessment data. Second, we have extended and modified our model across similar grades to a new district in KIPP Boston (5th grade in SY13, 5th and 6th in SY14), with strong early assessment results. The success of KIPP Academy Lynn’s middle school and high school grades and the upcoming launch of KIPP Boston elementary grades in advance of KIPP Academy Lynn Elementary will all provide the new elementary operation in Lynn with a roadmap for program and curriculum design, talent development, facilities planning, financial budgeting, and operational execution. It also allows us to establish clear benchmarks for student, staff, and organizational performance. We have added School Operations Managers at each of our schools who operate as a Vice-Principal in charge of logistics and non-instructional tasks. This role has allowed our Principals to devote more time to talent development, instructional leadership, and family engagement.

School Leadership Pipeline:

Beyond KALCS’ original founding principal Josh Zoia, KIPP:MA has demonstrated it can develop a pool of talented rising school leaders to successfully open new schools while preserving the leadership capacity of our existing schools. For KIPP Academy Lynn middle school, Anna Breen effectively succeeded Josh Zoia. Since then, each of the founding principals of our new schools have been among the highest rated nationally in the KIPP Foundation “Fisher Fellowship” program to train new School Leaders in “Year 0” of start up. These include Andrea DeAngelo (KIPP Academy Lynn Collegiate High School), Christine Barford (KIPP Academy Boston Middle School), Emily Dobell (KIPP Academy Boston Elementary School), and now Eveleen Hsu who has been selected as our Fisher Fellow and founding Principal for KIPP Academy Lynn Elementary School. Each principal is responsible for working with the regional leadership to cultivate bench depth for school leadership including both a successor for themselves and founders for future KIPP:MA schools.

National KIPP Network Resources:

KIPP Massachusetts benefits from the expertise shared directly by peer KIPP regions and schools around the country who share KIPP’s culture of collaboration, sharing, and site visits. Nationally in SY14 there were 141 KIPP schools in 20 states and the District of Columbia serving more than 50,000 students at KIPP elementary, middle, and high schools. In addition, the KIPP Foundation has grown its own staff and systems to provide leadership development programs (for principals, executive directors, and teacher leaders), research and development, and best practices to regions like KIPP Massachusetts. For example, the KIPP Foundation continues to convene in-person trainings, but also launched “KIPP:Share,” a highly active, web-based community and database for seeking and sharing best practices, curricula, and tools with the KIPP network.

Risks & Mitigation:

Through significant analysis, we have also identified risks inherent in organizational growth, as well as methods of mitigating these risks. We have found that our greatest risks fall within the following categories: talent, quality and innovation, fundraising, facilities, and sustainability. Our analysis is described in the table below.

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Category	Risks to Manage	Mitigation
<i>Talent</i>	Whether KIPP:MA can competitively recruit, retain, and develop the strong leadership, high performing and dramatically larger staff and board needed for success.	<ul style="list-style-type: none"> ● Strong leadership team and board ● Deep investments in teacher professional development, coaching, leadership career paths, and progressive compensation and benefits program ● Systematic recruitment and new teacher pipelines ● A positive regional culture that attends to personal and professional development
<i>Quality & Innovation</i>	Whether KIPP:MA can maintain and improve excellent outcomes, as well as balance innovation with consistency, during rapid growth and regionalization.	<ul style="list-style-type: none"> ● Clarified theory of change, intended outcomes, and region-wide goals balanced with school-specific goals ● Academic and data systems ● Investments in effective teaching, including instructional coaching and use of data for instruction ● KIPP network knowledge
<i>Fundraising</i>	Whether KIPP:MA can competitively raise increased private funds – annual operating and growth capital – required to invest in growth and sustainability.	<ul style="list-style-type: none"> ● High quality development team ● Track record of annual and capital fundraising ● Board prioritization of give/get fundraising recruitment
<i>Facilities</i>	Whether KIPP:MA can secure and finance new school buildings given availability, costs, and competition.	<ul style="list-style-type: none"> ● Experience from High Rock success ● Strong external partners and advisors ● Track record of securing financing ● Strong facilities and finance teams, consultants, and board committees
<i>Sustainability</i>	Whether economic conditions and internal management allow KIPP:MA to reliably increase public revenue, manage cash and working capital, and build its balance sheet to reach sustainability.	<ul style="list-style-type: none"> ● Sound business plan and financial model with sustainability metrics ● Appropriate tuition projections and competitive charter applications ● Strengthen compliance and government grants management ● Expanding Line of Credit and pursuing other working capital financing options ● Scenario and contingency planning

Process for Managing, Communicating, and Evaluating Implementation:

Start Up Implementation: During the remainder of start-up preparations during FY15 before opening elementary grades in FY16 and expanding upper grades in FY16, KIPP:MA is taking these steps to manage, communicate, and evaluate implementation progress:

- **Start Up Team Communication & Accountability:** Weekly calls including Founding Principal, Founding School Operations Manager, Executive Director, Director of Leadership Development, Chief Operating Officer and (when agenda topics warrant) the following Regional Office staff: Talent Recruitment Director, Director of Human Resources & Regional Operations, Director of Finance &

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Regional Operations, Director of Teaching & Learning, Technology Manager, Special Education/ELL Director.

- **Implementation Plan:** Written, cross-functional action plan for startup covering tasks, assignments, due dates, and status for all work streams needed to open Elementary grades successfully.
- **Board Oversight:** Progress on starting up new schools and grades is reported and discussed at every Board meeting and frequently through committees. The Board meets at least 6 times per year and at each meeting evaluates performance of our existing and start-up schools through review of an organizational goals dashboard and detailed reports on finance, development, facilities, teaching & learning, and compliance. Throughout the year, meetings of committees and advisory task forces include topics related to new school start up and expansion.
- **Start Up Budget:** For each new school (e.g. Lynn elementary grade levels), KIPP:MA prepares an operating budget for Year 0 start up to ensure resources are in place and managed effectively.
- **Academic Planning:** Weekly meetings throughout Year 0 including the regional CAO, regional Teaching & Learning staff, and KALE Founding Principal to refine curriculum, assessment and professional development plans.
- **Staff Recruiting:** Meeting during Year 0 (weekly during late fall, winter, and spring) including Director of Talent Recruitment, other Recruitment staff, and KALE Founding Principal to review strategies, candidates, and hiring decision to recruit and select KALE founding staff. (Similar process occurs annually with principals of other existing schools, KAL and KALC.)
- **Principals Community of Practice:** Periodic meetings of KALE Principal and KABE Principal to share best practices and learning about elementary school founding.

Ongoing Implementation: Starting in FY16 once elementary grades are first open and upper grades are further expanding in FY16, KIPP:MA is taking these steps to manage, communicate, and evaluate implementation progress:

- **School Leader & Manager Communication & Accountability:** Weekly one on one meetings with Founding School Leader and her manager, likely the Director of Leadership Development/CAO or the Executive Director.
- **Board Oversight:** Progress on starting up new schools and grades is reported and discussed at every Board meeting and frequently through committees. The Board meets at least 6 times per year and at each meeting evaluates performance of our existing and start-up schools through review of an organizational goals dashboard and detailed reports on finance, development, facilities, teaching & learning, and compliance.
- **Operations & Finance Support:** Regular meetings and practices for Regional Office operations staff to provide support to School Operations Managers. Monthly budget management meetings for each school with Regional Office finance staff, School Leader, and School Operations Manager.
- **Principals Community of Practice:** Periodic meetings of all active KIPP:MA Principals with facilitation from Executive Director, CAO, and other Regional Office staff to share best practices and learning, and provide input on cross-region decisions about vertical/horizontal alignment, policies, etc.
- **Dashboard Reviews:** At least monthly review by Regional Leadership Team members and School Leaders of each school's performance dashboards for progress on academic and operational goals.

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8.2 Action Plan for Implementation – Provide an action plan for implementation. Describe the proposed strategies that will lead to a successful implementation of the proposed changes. Include: a timeline, actions to be taken, designated point person, and start date and projected completion date.

Overview: The action plan below emphasizes activities required to implement the start up of KIPP Lynn’s elementary grades proposed in the charter amendment request. For the portion of the amendment request regarding the expansion of existing middle and high grades, only major action steps associated with the larger enrollment are included below and general ongoing implementation tasks for those grades are not included here. The timeline is based in part on our experience starting up other schools and grade levels at KIPP:MA, including Boston elementary.

[Topic]: Actions	Point Person (bold is primary)	Start Date	Complete Date
Student Recruitment & Enrollment	Point Person	Start Date	Complete Date
<i>Prepare KALE application and enrollment policy</i>	Compliance Manager, Operations Manager	September 2014	November 2014
<i>Enter applications, set database, prepare for lottery</i>	Ops Manager	February 2015	March 2015
<i>Run lottery</i>	Ops Manager	March 2015	March 2015
<i>Fill enrollment spots and file pre-enrollment report</i>	Ops Manager, Compliance Manager	March 2015	March 2015
Family Engagement	Point Person	Start Date	Complete Date
<i>Conduct new family orientation sessions</i>	KALE Principal, Ops Manager	April 2015	June 2015
Staff Recruitment & Hiring	Point Person	Start Date	Complete Date
<i>Create new staff recruitment plan, revising as staffing planned refined during Year 0 planning</i>	Director of Recruitment, KALE Principal	Aug 2014	Sept 2014
<i>Establish ideal candidate profiles, revising as staffing planned refined during Year 0 planning</i>	KALE Principal, Director of Recruitment	Sept 2014	Sept 2014
<i>Post positions, revising as staffing planned refined during Year 0 planning</i>	KALE Principal, Director of Recruitment	Oct 2014	Dec 2014
<i>Primary recruitment and selection process, with goal of 100% new positions hired by June 30, 2015</i>	KALE Principal, Director of Recruitment	Nov 2014	May 2015

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Professional Development & Leadership Development	Point Person	Start Date	Complete Date
1. Ongoing leadership coaching of KALE principal and instructional coach <i>*Additional training will be provided through the KIPP Foundation's Fisher Fellowship Program</i>	Director of Leadership Development, CEO	July 2013	Ongoing
2. Plan professional development for Summer of 2015	KALE Principal, Director of Leadership Development, KABE Principal	January 2014	May 2015
3. Plan year long professional development goals	KALE Principal, Director of Leadership Development, KABE Principal	January 2014	July 2015
Governance & Authorization: Actions	Point Person	Start Date	Complete Date
1. Update and gain board approval of region-wide KIPP:MA budget and multi-year business plans for all schools, including KALE Year 0 budget and charter amendment request for KALE and added MS & HS seats	COO, ED, Finance Director, Finance Committee, Full Board	Jan 2013	June 2014 (complete)
2. Re-submit charter amendment	ED, COO, Board Chair	Jun 2013	July 31 2014
3. DESE interviews Board & Leadership Team and other DESE decision process steps (assumes no other charters apply in Lynn this round)	ED, COO, Board	Aug 2014	Oct 2014
4. Confirm DESE decision on amendment	ED, COO	Oct 2014	Oct 2014
5. KIPP:MA Board reviews and approves as needed updated plan for Lynn (and Boston) elementary schools and other growth	ED, COO, Board	TBD	TBD
School Design Plan & General Elementary Planning: Actions <i>(School Design Plan milestones follow national KIPP Foundation's Year 0 Fisher Fellowship Program for founding Principals.)</i>	Point Person	Start Date	Complete Date
Clarify KALE elementary community mission, vision, and values	KALE Principal	June 2014	January 2015
Set KALE annual school performance goals	KALE Principal, Executive	June 2014	January 2015

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	Director, Director of Leadership Development		
Research & Visit other KIPP network and MA peer elementary schools	Director of Leadership Development , KALE principal	August 2013	April 2015
Present elementary <i>School Vision & Overview</i> section of School Design Plan to national KIPP Foundation and peers	KALE Principal , with support from KIPP:MA team	July 2014	July 2014
Revise elementary <i>Staffing, Students, and Instruction</i> sections of School Design Plan and present national KIPP Foundation and peers	KALE Principal , with support from KIPP:MA team	Aug 2014	Oct 2014
Revise <i>Community Relations & Outreach, Governance, Accountability, Financial Plan & Management, and Facilities</i> sections of elementary School Design Plan and present national KIPP Foundation and peers	KALE Principal , with support from KIPP:MA team	Sept 2014	Nov 2014
Finalize School Design Plan for elementary and present to national KIPP Foundation and peers	KALE Principal , with support from KIPP:MA team	Nov 2014	Jan 2014
Finance: Actions	Point Person	Start Date	Complete Date
1. Update and gain board approval of region-wide KIPP:MA budget and multi-year business plans for all schools, including KALE Year 0 budget and charter amendment request for KALE and added MS & HS seats	COO , ED, Finance Director, Finance Committee, Full Board	Jan 2013	June 2014 (complete)
2. If amendment approved, lock in and refine multi-year budgets in KIPP:MA business plan for MS and HS grades	COO , ED, Finance Director Finance Committee, Full Board	Oct 2014	Dec 2014
3. If amendment approved, lock in and refine KALE multi-year budgets in KIPP:MA business plan during KALE planning occurring in FY15 (Yr 0).	COO , Finance Director, School Principal & Ops Mgr	May 2013	June 2015
4. Finalize KALE FY15 (Yr 0) start up budget for board approval	COO , Finance Director, School Principal & Ops Mgr	Apr 2014	June 2014 (complete)
5. Finalize KALE FY16 (Yr 1) operating budget for board approval	COO , Finance Director, School Principal & Ops Mgr	Apr 2015	June 2015
6. Update insurance policies for Elementary	COO , Regional Ops Mgr	Jan 2015	May 2015

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7. Establish financial processes, procedures, and systems for KALE elementary; prepare for audit	Finance Director , School Ops Mgr	Jan 2015	July 2015
Facilities: Actions	Point Person	Start Date	Complete Date
1. KALE facility search conducted and site identified	COO, Real Estate Consultant , Facility Ctte	May 2013	Dec 2014 (likely site already identified)
2. If KALE facility leased (temp or perm), then lease executed	COO , Real Estate Consultant Bob Baldwin	Jun 2014	Dec 2014
3. If KALE facility new build or major renovation, then insert work streams here for site acquisition, site planning, due diligence, design, financing, public bidding, construction, and furnishing here.	COO, Real Estate Consultant , Facilities Ctte	TBD	July 2015 (or later if start up in temp space, then perm build)
4. Long range space plan completed for High Rock campus (project MS & HS space needs at scale vs. space available at High Rock)	COO , Lynn Facility Mgr, MS & HS School Ops Mgrs, Facilities Ctte	Apr 2013	Dec 2014
5. High Rock build out design and construction budget to add classrooms to existing building for MS and HS in FY15	COO , Arrowstreet Architects, School Principals & Ops Mgrs, Facility Mgr	May 2013	Dec 2013 (complete)
6. Funds identified for High Rock build out	Chief Development Officer	May 2013	Apr 2014 (complete)
7. Selection Process for High Rock build out contractors	COO , Facility Mgr	Jan 2014	Apr 2014 (complete)
8. Construction for High Rock Lower Level build out	COO , Facility Mgr, Contractors TBD	June 2014	Aug 2014
9. Decisions and plans complete for additional build out or expansion of High Rock campus for MS & HS (if build out or adjacent parcel acquisition required, add related work streams here: site planning, due diligence, design, financing, public bidding, construction, FFE).	COO , Facility Mgr, School Principals & Ops Mgrs, Real Estate Consultant, Facilities Ctte	TBD	TBD
10. KALE building services in place (security, cleaning, trash removal, utilities, etc.)	COO , School Ops Mgr	Jan 2015	July 2015
11. KALE furniture ordered and installed	School Ops Mgr TBD	May 2013	Aug 1 2015

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12. KALE ADA accessibility for disabled individuals	School Ops Mgr, COO	June 2013	Aug 1 2015
13. KALE facility Multi-Hazard Emergency Plan, with input from local fire and police	School Ops Mgr, COO	June 2013	Aug 1 2015
14. FY16 KALE facility build out complete w/permits and inspections in place (CofO, Fire, Health); ready for students	School Ops Mgr TBD	TBD lease or build	Aug 1 2015
Transportation: Actions	Point Person	Start Date	Complete Date
1. Review options for KIPP Lynn bussing via continued outsourcing (likely) or Lynn Public Schools (unlikely)	COO, School Ops Mgrs	Jan 2013	Oct 2014
2. Update Lynn MS & HS transportation plans for larger enrollments if amendment approved	School Ops Mgrs	Jan annually	July annually
3. Secure transportation services via outsourcing or LPS for KALE elementary students	School Ops Mgrs	Jan 2015	June 2015
4. Provide transportation plan and related compliance information to DESE	School Ops Mgrs, Regional Compliance Mgr	Annually per DESE timeframes	Annually per DESE timeframes
Food Services: Actions	Point Person	Start Date	Complete Date
1. Annual review nutrition services plan and compliance for all Lynn programs with DESE Nutrition Office, site visits as needed	School Ops Mgrs	July annually	Oct annually
2. Apply to DESE nutrition office to add elementary grade programs	School Ops Mgr	Apr 2015	July 2015
3. Prepare nutrition plan for KALE elementary	School Ops Mgr	Jan 2015	July 2015
4. Secure meals vendor for KALE elementary	School Ops Mgr	Jan 2015	May 2015
5. Systems for meals tracking, compliance reporting, and claims in place for KALE elementary	School Ops Mgr	May 2015	July 2015
Other Compliance: Actions	Point Person	Start Date	Complete Date
School Health Plan & Med. Admin. Plan updated for Elementary	School Ops Mgr, Regional Compliance Mgr	Apr 2015	June 2015

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School Nurse & School Physician in place for Elementary and compliance documented	School Ops Mgr , Regional Compliance Mgr	Apr 2015	June 2015
Student & Family Handbook for Elementary in place, including Wellness Policy, Complaint Procedure, Code of Conduct, etc.	School Ops Mgr , Regional Compliance Mgr	Apr 2015	June 2015
Update KIPP Lynn Accountability Plan and Annual Reports to include Elementary grades	Regional Compliance Mgr , Principals, ED, COO	Aug 2014	Dec 2015
Update KIPP Lynn recruitment, retention, and enrollment plans and policies for Elementary	Regional Compliance Mgr , School Ops Mgr, COO	Aug 2014	Dec 2015
Technology: Actions	Point Person	Start Date	Complete Date
Establish technology plan for KALE elementary (infrastructure, security, staff computers, phones, student devices, etc.)	Regional Technology Manager , School Ops Mgrs, Principals, COO	Sept 2014	May 2015
Purchase and install KALE elementary technology	Regional Technology Manager , School Ops Mgrs	June 2015	Aug 2015
Update KIPP Lynn Technology Plan for KALE elementary	Regional Technology Manager , Regional Compliance Mgr, School Ops Mgrs	Annual	Annual
Human Resources Administration: Actions	Point Person	Start Date	Complete Date
Compensation Structure & Program confirmed for KALE elementary	Human Resources Director , COO, Principal, ED	Jan 2015	Jan 2015
Benefits, Payroll, CORI background checks, Personnel files, and other HR systems and process in place for KALE Elementary	Human Resources Director , COO	Jan 2015	Aug 2015
Grants: Actions	Point Person	Start Date	Complete Date
Federal and State entitlement grants (Title 1, SPED, etc. researched and applied for accounting for Elementary grades for Year 1 of operation	Regional Grants Manager , COO, Finance Director	Jan 2015	Oct 2015
Special government grants (CSP, i3, etc.) researched and applied for accounting for Elementary grades for Year 0 and 1 of operation	Regional Grants Manager , COO, Finance Director	Jan 2014	Oct 2015
Fundraising: Actions	Point Person	Start Date	Complete Date

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Private Annual Fund revenue raised for KIPP Lynn Elementary, Middle, and High School budgets according to goals and deadlines in region-wide business plan and development plan	Chief Development Officer	Quarterly Goals	Quarterly Goals
Private Growth Capital revenue raised for KIPP Lynn Elementary, Middle, and High School budgets according to goals and deadlines in region-wide business plan and development plan	Chief Development Officer	Quarterly Goals	Quarterly Goals

8.3 Staffing Plan – *Provide a complete staffing chart and detailed narrative staffing plan to support the planning and implementation of the proposed increase in enrollment and/or grade span.*

Our K-12 staffing model is designed to support our long-term academic goals. Below please find a narrative description and chart for our staffing model for new elementary grades K-4, followed by a brief discussion of staffing for expanded middle and high school grades 5-12.

Elementary Staffing - Grades K-4:

Leadership: For the KALE elementary grades, our leadership team will be comprised of the instructional leader, the Principal, with the support from an Assistant Principal and Operations Manager beginning in year 1. This leadership model will allow the principal to have a laser focus on teaching and learning, and ensure that all teaching staff receives individualized coaching and support.

Curriculum & Schedule to be Staffed: Every student at KALE will receive a minimum of 90 minutes of literacy instruction daily and 70 minutes of math instruction. In addition, students will receive Science instruction a minimum of four times a week. Social studies, including geography, and specials (physical education, art, music) will be taught a minimum of twice a week depending on grade level. In K and 1, students will also have learning labs, time to apply knowledge and skills and also learn through play and peer interactions.

Lead teachers at each grade level will have daily common planning time. They will use this time to plan lessons together, discuss supports for students and grade-wide issues, analyze assessment data, and share best practices. It is also our goal that learning specialists, ELL teachers, and our reading specialists will attend these meetings whenever the content is applicable. In addition, lead teachers and teaching fellows will have common planning time in order to plan for and maximize targeted small group instruction.

Classroom Lead Teachers & Teaching Fellows: There will be five classes in each grade level. Each class will have a lead teacher who will provide the whole group instruction for reading, math, and social studies. In grades K and 1, all classes will also have a teaching fellow – someone with a bachelor’s degree and limited teaching experience who is in training to become a lead teacher. Teaching fellows will primarily teach small groups of students during guided reading and phonics, writing and math workshop time. They will serve as the lead planners for science instruction in these grades. In addition, they will have other responsibilities which may include leading recess and/or learning labs. It is our goal that by the end of the school year, teaching fellows will be able to lead

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more whole group instruction in order to prepare to take on their own class the following school year. In grades 2-4 teaching fellows will float between classes, providing targeted instruction during math and reading blocks.

Science: In grades 2-4 science will be taught by a Science Specialist. Our Science Specialists will have strong science content knowledge and teach using the inquiry method. Because of the intensive amount of set up and preparation this requires, we believe it is important to have teachers who are solely dedicated to teaching this content.

Other Instructional Specialists, SPED, and ELL: In addition to our lead teachers, teaching fellows, and science teachers, we will also have enrichment/specials teachers (art, music, and gym), learning specialists, ELL teachers, reading specialists, and counselors. Learning specialists, ELL teachers, counselors, and our reading specialists will provide support in the classroom whenever possible. If pull out support is necessary, schedules will be determined based on the type of pull out support the child is receiving. For example, if a child needs pull out support for reading comprehension, this will occur during the guided reading block. The Special Education and ELL coordinator will make sure we are in full compliance with providing the best services to students and will manage our Response to Intervention process.

Operations: Our School Operations Team is designed to manage all non-instructional responsibilities and duties at the school. The primary responsibility of the School Operations Manager is to create systems and resources that allow our teachers to focus primarily on the classroom. He or she will approve purchase requests and place orders, coordinate school meals and transportation, monitor student data and ensure compliance, monitor facilities and coordinate necessary repairs, and address technological needs such as copier malfunction. The Operations Manager will also play an integral role in the on-boarding of new staff by scheduling school visits and communicating application and sample lesson requirements. As the school grows, the School Operations Manager will also be responsible for managing non-instructional staff (custodians, office managers, nurse, cafeteria aide, etc.)

Staffing Chart - Elementary Grades K-4:

Lynn Elementary School (Grades K-4): Staffing Plan							
updated 7/9/14		FY15	FY16	FY17	FY18	FY19	FY20
YEAR OF OPERATION		Yr 0	Yr 1	Yr 2	Yr 3	Yr 4	Yr 5
STUDENTS							
	Kindergarten	0	120	120	120	120	120
	1st Grade	0	0	120	120	120	120
	2nd Grade	0	0	0	120	120	120
	3rd Grade	0	0	0	0	120	120
	4th Grade	0	0	0	0	0	120
	Students – Total	0	120	240	360	480	600
STAFFING							

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Lynn Elementary Staffing	FY15	FY16	FY17	FY18	FY19	FY20
School Leadership						
Principal/School Leader	1.0	1.0	1.0	1.0	1.0	1.0
Assistant Principal / Dean	0.0	1.0	1.0	1.0	2.0	2.0
Total School Leadership	1.0	2.0	2.0	2.0	3.0	3.0
Core Academic Instruction Staff						
Lead Teacher, Classroom (K-4)		5.0	10.0	15.0	20.0	25.0
Teaching Fellows		5.0	10.0	12.0	14.0	17.0
Total Core Academic Instruction Staff	0.0	10.0	20.0	27.0	34.0	42.0
Other Instruction Staff						
Teachers, Enrichment (PE, Arts, Music)	0.0	1.0	2.0	3.0	4.0	5.0
Teacher, Science	0.0	0.0	0.0	1.0	2.0	3.0
Teaching Fellows	0.0	0.0	0.0	0.0	0.0	0.0
Total - Other Instruction Staff	0.0	1.0	2.0	4.0	6.0	8.0
Special Education Staff						
SPED & ELL Coordinator	0.0	0.5	1.0	1.0	1.0	1.0
Learning Specialists (SPED)	0.0	1.0	2.0	3.0	4.0	5.0
ELL Teacher (SPED)	0.0	1.0	2.0	3.0	4.0	4.0
Reading Specialist (SPED)	0.0	1.0	1.0	1.0	1.0	1.0
One-on-One Aides (SPED)	0.0	0.0	1.0	1.0	2.0	2.0
Total - Special Education Staff	0.0	3.5	7.0	9.0	12.0	13.0
Student Services Staff						
Counselor	0.0	1.0	1.0	2.0	2.0	3.0
Nurse	0.00	0.50	0.75	1.00	1.00	1.50
Total Student Services Staff	0.00	1.50	1.75	3.00	3.00	4.50
School Operations Staff						
Office Manager	0.00	1.00	1.00	1.00	1.00	2.00
School Operations Manager	0.50	1.00	1.00	1.00	1.00	1.00
Technology Associate	0.00	0.25	0.50	0.75	0.75	1.00
Cafeteria Aide 1	0.00	0.25	0.50	0.75	0.75	0.75
Cafeteria Aide 2	0.00	0.00	0.00	0.25	0.50	0.75
Custodian 1	0.00	0.10	0.50	1.00	1.00	1.00
Custodian 2	0.00	0.00	0.00	0.50	0.50	1.00
Total - School Operations Staff	0.50	2.60	3.50	5.25	5.50	7.50

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Total - School-Based Staff	1.50	20.60	36.25	50.25	63.50	78.00
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Middle & High School Staffing - Grades 5-12: For the expansion of seats for grades 5-12, there is limited impact on the staffing model and little need for changes or increased staff, thanks to economies of scale. Over the past several years, our middle school grades have already been ramping up from three sections/classrooms per grade to four sections/classrooms per grade, with a clear staffing model for four-section grades. For the additional expansions seats now requested, the number of sections/classrooms per grade does not materially change with the increase of the Middle grades to up to 128 students or the High grades to up to 120. Therefore, the number of core instruction teachers does not need to increase, and support staff in SPED, ELL, counseling, administration, and operations only increases moderately. At full scale, Lynn Middle is projected to have 512 students supported by 55 staff FTEs. At full scale, Lynn High is projected to have 474 students supported by 60 staff FTEs. These staffing models include significant continued investment in SPED, ELL, and counseling services.

9: Governance

9.1 Demonstrated Effective Governance [Optional] – *Schools may choose to summarize briefly within their request board activities that demonstrate effective governance, including compliance with applicable laws and regulations, and examples of corrective action in response to identified challenges. The summary may include specific achievements over the most recent charter term; analyses of stakeholder satisfaction surveys; board and school leadership evaluations; board of trustees self-evaluation; and strategic planning. The summary should provide additional context to any recent circumstances in the school’s history involving these areas of the school’s performance.*

KIPP:MA benefits from an effective, highly engaged, and strategic Board which governs both the Lynn and Boston charters. During the last four years, the KIPP:MA Board has evolved from a start-up board into true strategic governance. The Board has overseen KIPP to:

- Create a multi-year business plan
- Enter a second district under a new charter
- Open 3 new schools beyond our original Lynn Middle grades (within two charters: Lynn High FY12, Boston Middle FY13, Boston Elementary FY15)
- Launch our regional network office
- Thrive through founding ED and Board chair transitions
- Open new facilities
- Support our first classes of alumni in college
- Achieve our best academic results to date
- Increase students served in Lynn and Boston from 370 to 1138 for FY15, staff from 45 to 182, and budget from \$5M to \$19M

In FY14, the Board comprised 13 members, plus our Executive Director. At the end of FY14, four members transitioned off the Board due to term limits and geographical moves out of the area. Through a strategic recruitment process, we will be adding to the Board in the coming year. Board member backgrounds include

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leadership roles in law, venture capital, private equity, philanthropy, real estate, marketing, technology, K-12 public policy, and teacher recruitment/development. Two have served in prominent posts in the Massachusetts Department of Education. While retaining veterans for continuity, the Board recruited four new members in the past two years, adding diversity, expertise, and networks. The board's main roles are: Fiduciary & Charter Accountability Oversight, Executive Performance Management & Development, Vision & Strategy, Financial Resourcing, External Champions, and Board Self-Management. In support, the Board has utilized committees and advisory tasks forces including Finance, Facilities, Governance, Compensation, Development, Teaching & Learning, Advocacy, and Strategic Planning. Each year, the Board and its Committees set performance goals aligned with organizational and Executive Director goals. While the full Board has been operating in compliance with Open Meeting Law, compliance has been reinforced in FY14 by ensuring committees operate under Open Meeting Law and through a DESE charter renewal condition, now met and certified, that all members complete formal Open Meeting Law training.

9.2 Board Implementation of Request and Evaluation of Success – *Describe how the board of trustees will implement the request effectively and evaluate its success. Provide details of the board's role in planning, and monitoring progress of the expansion.*

KIPP's Board will oversee and implement expansion requested in this amendment using the same performance management and oversight practices it has used to ensure successful expansion of schools and grades over the past several years in Lynn and Boston.

The Board approves expansion plans and regularly evaluates the performance of our organization and schools to ensure faithfulness to our charter and successful, sustainable growth. Progress on starting up new schools and grades is reported and discussed at every Board meeting and frequently through committees. The Board meets at least 6 times per year and at each meeting evaluates performance of our existing and start-up schools through review of an Organizational Goals Dashboard and detailed reports on Finance, Development, Facilities, Teaching & Learning, and Compliance.

At year-end, the Board conducts a full review of the school's academic, operational, and organizational progress. This review includes a 360' review of the school leadership, analysis of test results, a review of budget-to-actual reports, as well as systematic internal review of each aspect of our school by the relevant Board committee. The results of reviews are used to create Board level goals and management goals during our yearly retreat each summer.

Our Executive Director reports to the Board of Trustees, and regularly meets with the Board Chair and other members to discuss progress. To execute with accountability, School Principals and Regional Office senior managers report to the Executive Director. The Executive Director and regional leaders also staff Board committees and task forces, adding to the governance-leadership structure.

9.3 Board Minutes – *Provide approved board minutes for the twelve months prior to the submission of this amendment request on August 1.*

Please see Appendix B for board minutes.

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10: Finance

10.1 Board's Demonstrated Effective Financial Management [Optional] – *Schools may choose to summarize briefly within their request board activities that demonstrate effective financial management, as well as compliance with applicable laws and regulations. The summary may include information regarding real estate acquisition, loan agreements and debt repayment, and fundraising, as applicable. The summary should provide additional context to any recent circumstances in the school's history involving these areas of the school's performance.*

Financial Oversight: KIPP's full Board and its Finance Committee exercise financial oversight and ensure effective management and compliance through these practices:

- Review monthly and/or quarterly budget-to-actual-to-projections via Finance Committee, and discusses variances and management actions to manage budget to goals
- Review monthly/quarterly financial reports at full Board meetings
- Review draft and approves final Annual Plan & Budget, including regional office and school-specific revenue and expense budgets, risks and mitigation, and contingency plans
- Approve financial model, business plan and long-range financial sustainability plan
- Approve annual audited financial statement; provides oversight over required policies and controls. Finance Committee holds annual meeting with independent auditors to review audit findings prior to recommending for approval to full Board.
- Approve new bank accounts and debt and other new financial commitments
- Approve fiscal policies
- Review and approve major real estate and facilities agreements and commitments
- Reviewing annual and multi-year fundraising plans

10.2 Explanation of Financial Data on DESE Dashboard – *The Department will review the school's financial history, including the Financial Dashboard, as part of the amendment request. Schools should explain any unique circumstances related to published school data, and corrective actions taken to address challenges in any of these areas of school performance within their request.*

KIPP Academy Lynn Charter School is operating from a strong and stable financial position, is not facing major financial risks, and is on track with its sustainability plan including the intentional use of real estate financing and private funding during a period of growth.

At first glance the 5 year Financial Summary presented at the DESE website, could appear to depict a weakening state of financial sustainability. However, the declining trend in some of the categories can be explained by a number of factors that unjustly influence the ratios chosen to represent the financial health of the school. Most notably, the growth in enrollment and grades and the financing of a permanent facility for the school, which both began to influence the financials in FY12.

Unrestricted Days Cash Ratio was rated a potential high risk in FY12 and FY13. KIPP Academy Lynn Charter School began to increase enrollment by adding grades 9-12, one grade per year, in FY12. As noted in the Financial Summary description, the ratio is based on the current quarterly tuition payment schedule, which has been challenging to fund the growth in advance of receipt of tuition payments, with ample cash reserves. KIPP has

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secured an adequate line of credit and uses it prudently to help manage cash during the low periods. The KIPP:MA 501c3 foundation also retains privately raised cash and assets that help support the school, these resources are not reflected on this Financial Summary.

In FY13, KIPP Academy Lynn Charter School's Percentage of Program Paid by Tuition was 63% and rated as a potentially high risk metric. KIPP has embarked on a substantial private Growth Capital Campaign to help subsidize the growth of our school. This campaign will reach its pinnacle in FY14 and then will continue to wane down until the school reaches its goal of being fully sustainable on recurring public funding at full scale, by FY20. In addition, KIPP's Regional Office's (network support services) expenses are reported with the school's expenses which further reduce the percentage of the program covered by tuition and federal grants.

KALCS budgets for positive operating cash surpluses each year in order to meet our goals for financial sustainability (see following section). The negative trend in the Change in Net Assets Percentage for the past two years, depicted on the Financial Summary, is mainly the result of large capital outlays and amortization and depreciation expenses for our facility. The acquisition of financing for the purchase of the school's current facility occurred during FY12. This new facility required significant capital investment and was funded through a combination of the school's own equity, mainly private fundraising, New Market Tax Credits, and tax exempt bonds. The structure of the financing requires a high level of non-operational financing interest, fees, and other non-cash items. The decreases the school's changes to the net asset ratio, and unrestricted days cash, are directly related to this project. Also, the non-inclusion of the Foundation's assets in the Financial Summary, further overstates this condition.

Despite the illusion of a negative trend, KALCS is in good financial standing and is operating within its well defined financial sustainability plan.

10.3 Necessary Financial Resources and Projected Sources of Revenue – *Describe the financial resources that are necessary to implement the school's expansion, including the projected sources of revenue that will ensure the fiscal viability of the school and the successful implementation of the proposed changes. Describe contingency planning for potential challenges in cash flow or budget shortfalls due to lower than anticipated student enrollment or other financial challenges in the early years of expansion, include specific strategies.*

Overview: The following summarizes the business planning and financial sustainability context for our charter expansion, specific revenue sources expected, and approaches to cash management and contingency planning. (Section 10.4 includes full financial projections including multi-year revenue and expense budgets, as well as narrative discussion of projections and assumptions.)

Business Plan: Building on its original charter, the Board and staff of KALCS (and KIPP Boston) completed and are implementing a comprehensive business plan for growth with quality and sustainability during the FY12-FY20 period. The plan includes a detailed financial model that demonstrates a sustainable financial path for both the existing charters and for further growth proposed in this amendment. The financial model includes position by position annual staffing plans, detailed analysis of each revenue source and critical expense driver, "pro forma" income statements with line item budgets for each "school" under the charter (separate budgets for Lynn elementary, Lynn middle, and Lynn high school grades) and for the Regional Office, and overall pro forma financials for the aggregate charter and for KIPP Massachusetts region.

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Sustainability: The chart below summarizes the definition of financial sustainability that KIPP is applying in both Lynn and Boston. Our projections for proposed growth in Lynn allow for achieving these metrics of sustainability in new Elementary grades and expanding Middle and High grades.

Financial Health & Sustainability	Questions to Answer	How We Measure It	Targets
1. COST EFFECTIVENESS	Are we thrifty? Do we use public dollars efficiently? Do we maximize outcomes per dollar spent? Do we gain economies of scale as we grow?	<ul style="list-style-type: none"> Cost Per Student (scale economies): Cost/Benefit Competitiveness 	<ul style="list-style-type: none"> ~25% Decrease in FY12 Constant \$ by FY20 Outcomes/\$ ≥ top charters, > districts
2. LIQUIDITY	Do we have the cash on hand to pay our bills and commitments?	<ul style="list-style-type: none"> Months of Cash Debt Service Coverage Ratio 	<ul style="list-style-type: none"> By FY20, Cash ≥ 4.5 Mos, + LOC ≥ 6 Mos ≥1.0 Operating Cash Flow / All Debt Service ≥1.1 Operating Cash Flow / Bond Service
3. PUBLIC vs. PRIVATE REVENUE MIX	Are our revenue sources renewable and scalable? At scale, can we get better outcomes with same public tuition as districts?	<ul style="list-style-type: none"> % Public Revenue of Total Revenue % Public Revenue of Total Expenses Private Fundraising Performance 	<ul style="list-style-type: none"> ≥97% by FY20 (each school & region) ≥100% by FY20 (each school & region) Private avg ~15% of Revenue During Growth, then 0-3%
4. OPERATING PERFORMANCE	Do we set accurate budgets? Do we stick to our budget? Do we finish in the black?	<ul style="list-style-type: none"> Surplus as % of Expenses Budget & Expense Management 	<ul style="list-style-type: none"> ≥5% Annual Surpluses (each school & region)
5. RESERVES & PREPAREDNESS	Are we financially prepared with a backup plan for risks (like funding cuts) or unplanned opportunities (like real estate)	<ul style="list-style-type: none"> Cash Reserves for Risks Cash Reserves for Opportunities Cumulative surplus within maximum allowed by regulations 	<ul style="list-style-type: none"> If Tuition 0% inflation and raised only 50% of annual private fundraising goal ~\$1M by FY17, \$2M by FY20
6. COMPLIANCE & CONTROLS	Do we run a tight ship? Do we have strong financial management systems that protect our resources and meet external compliance requirements?	<ul style="list-style-type: none"> Audit: Clean, Unqualified, No Material Weakness or Significant Deficiency Compliance with Laws, Regulations, & Covenants Accuracy & Timeliness of Budget-to-Actuals-to-Forecast 	

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Sources of Revenue: KIPP plans to secure these categories of financial resources to fund the proposed charter expansion. (Section 10.4 shows actual numbers and projections for these sources.)

SOURCES OF REVENUE	DESCRIPTION
Public Tuition Revenue (State/Local)	KIPP’s primary revenue source is public per pupil tuition. Long term, our financial plan assumes annual 2% inflation increases, which are adjusted conservatively each budgeting season based on annually forecasted and published rates. We assume \$0 in Above Foundation funding for Lynn. Since we are adding some grades not operated before, differences in rates for elementary, middle, and high school are projected based on benchmarking existing charters and discussions with DESE Finance Office about rate differentials by school level. For Lynn Elementary until actual tuition is published and we have KIPP Boston Elementary rates to benchmark, we project per pupil rates that are approximately 5% higher than for Middle rates. We assume our future student demographics (FRPL, SPED, ELL) that impact tuition rates follow trends to date. We understand and plan for tuition rates to lag by one year, meaning the blended rate in a given year is based on the prior year’s student demographics and grade levels as of October SIMS. At scale, tuition plus other public formula funding covers 100% of school-based expenses.
State & Federal Formula Grant Revenue	KALCS’ financial plan assumes comparable per pupil rates and moderate inflation for historically funded formula grants (Title 1, SPED, Federal Nutrition Program, etc.) and trends for student population demographics.
Public Start Up Funds & Special Grants	Includes Federal CSP (Charter School Program) Start Up Grants of several hundred thousand dollars per school, be secured via a re-grant either from MA DESE or the national KIPP Foundation (The terms of the federal CSP grant to the KIPP Foundation is that grants can be allocated per school vs. the DESE CSP grants which are per charter). KIPP Foundation has indicated KIPP will receive CSP funding for Lynn Elementary grades. Other special DOE grants (e.g. i3) have been received in the past and may be pursued but are not included in projections.
Private Revenue - Annual Fund	Together, KIPP Lynn and Boston for the Annual Fund have historically been raising approximately \$500,000 per year in private annual fundraising programs for operations. This dollar amount is planned to increase to \$1M total as we grow to K-12 scale in Lynn and Boston. Our financial plan forecasts that each school (e.g. Elementary, Middle, and High) within the KIPP charters typically receives a portion of unrestricted Annual Fund revenue approximately equivalent to 3% of recurring public funding, to be raised by the KIPP:MA Regional Office development team and board.
Private Revenue - Growth Capital	KIPP’s financial modeling shows that each KIPP school within a given charter (KIPP Lynn, KIPP Boston) requires \$1-2M in private start up revenue (beyond the private Annual Fund) to subsidize the school’s tuition revenue and fixed costs until it reaches scale and sustainability when renewable public tuition and formula revenue covers at least 97% of total revenue. Over the past 3 years, KIPP Academy Lynn and the KIPP:MA Regional Office have demonstrated the capacity to raise over \$3M per year in total private funds, including successful completion of \$5M building capital campaign for the Lynn High Rock building and 70%+ progress toward a \$10M “growth capital campaign” for Lynn and Boston, primarily in the form of multi-year 6- and 7-figure pledges. KIPP is confident it can raise required growth

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	capital to support additional growth proposed in our amendment requests to add Lynn Elementary and expand seats for Middle and High school.
Other Income	KIPP generates small additional revenue from interest expense and modest fees to students and families for uniforms and meals not covered by free and reduced price lunch eligibility.

Contingency Planning & Cash Management: KIPP:MA has a sophisticated cash management plan in place to support further expansion and potential uncertainties of growth that could include unexpected shortfalls in enrollment/tuition or other revenue sources of unavoidable unprotected expenses.

To ensure separation of public funds for compliance and audit purposes, KIPP:MA must manage cash separately for its two legal public entities, KALCS (which as “flagship” includes Regional Office) and KIPP Boston. We annually project and regularly monitor the 52-week cash flow for each entity to test and ensure that low points and covenants are covered.

Prior to FY15, tuition has been paid quarterly. In FY15, the DESE begins monthly tuition payments, an advantage for managing cash and reducing the float required to fund expenses until tuition is paid. This means that although our working capital need still increases in dollars each year as our budget increases, it is now a lower proportion of budget. This plus reserves we are beginning to build both help manage cash risks. Our overall approach is to continue to fund working capital need with a roughly equal mix of internal cash and responsible, disciplined use of a line of credit.

Through FY14, Boston Private/Citizens have provided a Line of Credit (LOC) equal to one quarter of Lynn tuition. To ensure fiscal discipline, terms require KIPP to pay down to \$0 each quarter immediately after quarterly tuition payment was received. (Although banks typically only provide LOCs to charters with 3-year track record, we expect for KIPP Boston to receive and use a LOC as part of the Blue Hill facility financing closing by early 2015.

Capital & Use of Reserves: KIPP:MA generates discretionary cash in two ways, through private revenue fundraising and through generating operating surpluses. KIPP:MA’s approach is to fund working capital and support operating budget cash flows through using a portion of cumulative surpluses combined with our line of credit. This enables KIPP:MA to allocate the remaining cumulative surplus for reserves, or discretionary capital that can be used for opportunities like real estate equity or held as protection against risks. The cash management plan, private revenue goals and allocations, and out-year business projections are designed to enable KIPP to free up enough cumulative surpluses to allocate (when needed) moderate amounts of “equity” for real estate projects. We utilize cash from private sources to: pay for some ongoing operations, subsidize growth not yet covered by scaled public revenue, complement the LOC in funding working capital, and build reserves of discretionary capital for real estate or other opportunities and risks.

Annual Contingency Planning & Budget Management: For shorter term contingencies, KIPP:MA annually develops and updates a contingency plan that accompanies the board-approved annual budget. If revenue during the year falls short or if unplanned but required expenses are incurred, KIPP:MA is prepared with a contingency list of expenses that could be cut or deferred. This list details each item’s amount, description, and timing by which the decision would need to be made. At the individual school (ES, MS, HS) and aggregate charter/regional levels, staff review budget-to-actual-forecast reports monthly to determine status and whether any contingency actions should be taken. The Board Finance Committee and full Board also receives periodic financial reports throughout

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the year for KIPP:MA and can request, recommend, and be consulted on budget status and contingency decisions. Contingencies that may impact students and their outcomes are always de-prioritized below other cuts or changes that do not directly impact students.

10.4 Narrative: Financial Projections and Assumptions – *Provide financial projections performed in planning for the proposed expansion. Financial projections should reflect both immediate and long term considerations that the board and school leadership have identified in implementation of the proposed amendment. Provide a detailed narrative explaining the financial forecasts, and the underlying assumptions.*

Overview of Financial Projections: Following this narrative, please find two financial projections charts, which are drawn from KIPP:MA’s larger region-wide business plan and financial model for Lynn, Boston, and Regional Office:

1. *Aggregate Pro Forma for KIPP Academy Lynn:*

- Consolidates elementary, middle, and high school grades K-12
- Shows detailed operating revenues, expenses, and surplus forecast for each year of operation through full scale enrollment in Year 5 (FY20)
- Projections show cash operating basis (not accrual accounting basis)
- Excludes Regional Office (other than line for fee for regional services) in order to show operating financials and performance of Lynn schools. Note that on audited financial statements, Regional Office financials appear as part of KIPP Academy Lynn financials based on the DESE-approved “flagship” model of accounting for charter networks

2. *Elementary Pro Forma:*

- Lynn Elementary grades only
- Shows detailed operating revenues, expenses, and surplus forecast for each year of operation from Year 0 (FY15) through full scale enrollment in Year 5 (FY20)
- Projections show cash operating basis (not accrual accounting basis)
- Excludes Regional Office (other than line for fee for regional services)

(For context on KIPP’s business plan and sustainability metrics, please see section 10.3 Financial Resources.)

Lynn Consolidated Budget & Staffing Plans (Elementary, Middle, & High School Grades): In aggregate at scale with the proposed expansion, the combined operations of Lynn elementary, middle, and high school grades will reach revenue of \$24.3M and expenses of \$22.5M. These expenses do not include the total direct costs of the Regional Office that serves both Lynn and Boston, but rather a fee (12% of school-based budget) paid by each school within the charter (Lynn ES, MS, HS) to the Regional Office for regional services (separate from regional services provided to KIPP Boston. At scale, cost per student in inflated dollars including the regional fee is projected to be \$14.2K. In constant dollars, cost per student decreases over time to a lower amount as economies of scale are achieved. Operating surpluses of at least 5% are generated annually to contribute to financial sustainability, as detailed in section 10.3 Financial Resources.

Elementary-Level Budget: At scale, we project Lynn Elementary alone to have revenue of \$9.0M and expenses of \$8.5M. Cost per student in inflated dollars is projected to be approximately \$14.1K at scale in FY20, lower than in startup years before economies of scale are achieved. These expenses include a fee of 12% of budget paid

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(internal transfer) by each “school” (ES, MS, HS) to KIPP:MA’s “Regional Office” which provides network shared services. Operating surpluses of at least 5% are generated annually by the elementary unit to contribute to financial sustainability, as detailed in section 10.3 Financial Resources. The Lynn elementary budget will be further developed and revised based on further Year 0 planning and benchmarking, and actual expense data from Boston elementary which is operating one year ahead of Lynn.

Assumptions:

Revenue assumptions are detailed in section 10.3 Financial Resources, and include 2% annual tuition inflation rate increases.

Expense assumptions include these key factors:

- Personnel:
 - Staffing headcount driven by staffing assumptions in section 9.3 and school design model described elsewhere. Addition of staffing for one new grade per year as elementary grows to scale, and marginal increase in staffing at middle and high grades to support larger grade and class sizes.
 - Base salary increases of 2% annually, plus compensation in the form of stipends and annual bonuses for group and/or individual performance. Our Compensation Program (including teacher salary bands) is intended to be competitive with other high performing Massachusetts charter schools. If in a given year tuition inflation was greater than 2%, KIPP would consider greater than 2% base salary increases.
 - Benefits programs that continue to be competitive and progressive, with per FTE rates increasing at 3% per year, lower than some actual recent history to reflect increased purchasing power of larger employee base.
 - Substantial investments in professional development, some of which is included in other budget lines such as Travel.
 - Investments in SPED/ELL consulting services to complement in-house staffing in these areas.
- Direct Student Expenses:
 - Per student assumptions benchmarked from KALCS’ history with middle and high school grades, and projected costs for elementary based on expected costs for Boston elementary opening FY15 (the budget for which was developed with benchmarking data from peer MA and national KIPP elementary charters).
 - Most per student costs inflated 3% annually.
- Administration:
 - Benchmarked from KIPP Lynn’s history with middle and high school grades, and projected costs for elementary based on existing budget for Boston elementary opening FY15.
 - Some costs driven by number of students and some by number of staff.
 - Most administrative costs inflated 3% annually.
 - Some shared administrative costs and services housed at Regional Office and reflected further below in Regional Office fee line.

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- **Facilities:**
 - Rent/Financing payment assumed to be 13% of tuition for Lynn Elementary (whether lease or own) and for Middle and High based on actual annual financing payments associated with existing owned High Rock building in Lynn.
 - Other occupancy costs (utilities, maintenance, cleaning, etc) based on actual experience in leased and owned facilities in Lynn, inflated 3% annually.
 - Capital costs of acquiring facilities are not shown in these operating cash financial projections, and would be paid for through use of cumulative surplus and/or additional financing.

Financial Projections KIPP Lynn Schools, FY14-FY20 Aggregate: Elementary, Middle, & High (Excludes Regional Office except for fees for regional services)	FY2015	FY2016	FY2017	FY2018	FY2019	FY2020
# Students	850	1057	1208	1338	1466	1586
# School-Based Staff (FTEs) w/out Reg. Office	107	133	152	163	177	193
# of Grades: Grades Open	8: 5-11	9: K, 5-12	10: K-1, 5-12	11: K-2, 5-12	12: K-3, 5-12	12: K-12
REVENUE						
Public - Tuition Revenue						
Tuition - MA DESE	10,312,200	13,357,920	15,569,389	17,552,938	19,581,569	22,000,548
Transportation - MA DESE	46,001	58,965	69,432	79,240	89,453	99,709
Public - Tuition Revenue	10,358,201	13,416,885	15,638,820	17,632,178	19,671,022	22,100,257
Public - Other State Revenue						
SPED DOE 240 Fund	208,418	266,514	313,520	357,400	403,070	448,853
MassHealth Medicare	41,117	47,726	51,800	54,975	58,186	61,094
Public - Other State Revenue	249,536	314,240	365,321	412,375	461,256	509,947
Public - Local Revenue						
Local Transportation Reimbursement	35,000	35,000	35,000	35,000	35,000	35,000
Public - Local Revenue	35,000	35,000	35,000	35,000	35,000	35,000
Public - Federal Revenue						
Title I Grant	347,044	442,330	519,062	590,497	664,820	739,230
Federal Nutrition Program	405,481	511,479	597,731	676,589	758,452	839,725
Title II - Part A Teacher Quality	7,765	9,897	11,614	13,212	14,875	16,540
E-Rate Grant (technology)	-	-	-	-	-	-
Federal Formula Grants	760,290	963,706	1,128,407	1,280,299	1,438,148	1,595,495
Charter Start-Up Grant (via KIPP Fdn)	68,360	182,680	148,960	-	-	-
Other Special Grants (i3, RTTT, etc.)	-	-	-	-	-	-
Federal Start-Up & Special Grants	68,360	182,680	148,960	-	-	-

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Public - Federal Revenue	828,650	1,146,386	1,277,367	1,280,299	1,438,148	1,595,495
Private - Annual Fund	416,866	526,854	500,000	400,000		
Private - Growth Capital	432,958	400,000	325,000	375,000	100,000	-
Private - Bldg Capital Campaign Pmts for Operations						
Private Revenue Total	849,824	926,854	825,000	775,000	100,000	-
Other Income						
Interest & Other Income	3,421	6,842	6,842	6,842	6,842	6,842
Student Lunch Fees	16,026	27,761	28,176	28,310	28,417	28,417
Student Uniform Fees	10,000	13,600	17,200	20,800	24,400	28,000
Other Student Fees & Fundraising	23,913	34,681	35,488	35,935	41,361	41,641
Other Income	53,360	82,884	87,706	91,886	101,019	104,900
TOTAL REVENUE	12,374,570	15,922,249	18,229,214	20,226,738	21,806,445	24,345,600
EXPENSES	FY2015	FY2016	FY2017	FY2018	FY2019	FY2020
Personnel - Salaries						
School Leadership Salaries	706,212	992,458	1,012,307	1,032,553	1,123,204	1,145,668
Core Academic Instruction Salaries	2,608,356	3,396,719	3,943,653	4,386,258	4,803,847	5,278,550
Other Instruction Salaries	445,493	501,651	680,072	736,594	850,599	1,054,935
Special Education Salaries	1,149,607	1,421,620	1,544,165	1,696,867	1,859,685	1,937,623
Student Services Salaries	556,739	639,624	665,682	747,526	744,436	849,877
School Operations Salaries	530,647	625,079	671,360	746,172	753,888	841,245
Stipends	98,000	82,000	89,000	96,000	100,000	100,000
Bonuses	92,952	137,051	154,150	169,927	179,023	192,081
Personnel - Salaries	6,188,006	7,796,201	8,760,389	9,611,897	10,414,683	11,399,978
Personnel - Other						
Benefits	599,897	782,552	917,760	1,013,098	1,120,898	1,253,458
Payroll Taxes	200,499	325,214	364,221	398,430	430,775	470,626
Worker's Comp Insurance	39,759	44,950	47,880	50,240	52,826	56,212
Professional Development Fees	20,000	35,257	36,004	36,078	36,508	37,167
Consultants	134,046	143,067	152,209	161,476	170,870	180,396
Personnel - Other	994,202	1,331,039	1,518,074	1,659,321	1,811,876	1,997,859
Direct Student Expenses						
Food Service	519,932	670,748	792,787	907,963	1,028,004	1,148,941
Transportation - School Based	167,865	238,576	292,481	348,971	408,544	471,202
Transportation - Extracurricular	123,239	160,297	190,088	218,537	248,229	278,300
Student Uniforms	25,000	33,295	39,850	46,302	53,061	59,994
Medical Supplies	4,715	5,887	6,866	7,739	8,644	9,531

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Textbooks & Instructional Materials	65,073	82,687	97,131	110,440	124,271	138,055
Instructional Supplies	97,718	122,766	145,375	166,860	189,270	211,917
Fees (Trips, Activities, Sports, Electives)	236,506	288,412	343,219	396,192	451,557	507,921
Schoolwide Testing/Assessments	22,287	26,710	30,596	33,743	36,957	39,952
Copiers (Lease & Maintenance)	57,779	69,056	80,957	91,834	103,126	114,335
Printing	12,740	8,677	9,633	10,201	10,751	11,149
Furniture (Non-Capitalized)	1,607	1,867	2,108	2,283	2,458	2,611
Technology (Non-Capitalized)	34,101	42,141	48,925	54,856	60,978	66,924
Teachers' Choice	30,064	39,540	46,281	50,778	55,776	60,276
School Leader Discretionary Fund	12,500	-	-	-	-	-
Direct Student Expenses	1,411,127	1,790,658	2,126,296	2,446,698	2,781,627	3,121,108
Administration						
Accounting/Audit (@ Reg Office)	-	-	-	-	-	-
Legal Fees	1,533	1,773	1,826	1,881	1,937	1,995
Insurance (except Workers Comp)	76,142	92,536	103,913	113,410	122,727	122,727
Payroll Services	45,613	60,956	73,043	81,309	90,627	101,771
MTRS - Payments	30,417	42,079	50,785	57,932	65,613	74,745
Staff Recruitment Fees	62,000	65,735	69,542	70,250	72,359	75,460
General Supplies	27,573	35,179	41,393	47,158	53,154	59,148
Postage & Shipping	5,348	5,360	6,217	6,963	7,732	8,477
Staff Rewards	14,869	18,002	20,582	21,829	23,715	26,268
Food	19,279	23,272	26,744	29,612	32,552	35,321
Travel	76,500	87,077	101,738	114,699	127,338	140,493
Phone & Internet Service	22,125	28,736	33,846	37,407	41,632	46,881
KIPP License Fee	60,000	74,751	90,000	90,000	90,000	90,000
Fees & Memberships	32,502	36,848	39,313	40,944	42,545	43,821
Interest on Bank Loan (@ Reg. Office)	-	-	-	-	-	-
Bank Fees (@ Regional Office)	-	-	-	-	-	-
Furniture (Capitalized)	11,000	43,030	43,061	43,093	43,126	43,159
Technology (Capitalized)	78,350	127,201	129,313	131,488	133,729	136,036
Administration	563,250	742,535	831,316	887,977	948,784	1,006,303
Facilities						
Rent/Financing Payment	1,091,959	1,283,397	1,483,238	1,690,578	1,802,829	2,026,687
Utilities	132,013	161,561	192,764	209,406	220,162	226,767
Maintenance & Repair	48,000	55,772	63,966	72,603	81,700	91,277
Cleaning Services	61,920	71,945	81,978	92,568	103,618	115,463
Cleaning Supplies	25,600	26,368	27,159	27,974	28,813	29,677
Real Estate Taxes	-	-	-	-	-	-
Capital Improvement Reserve Fund	-	43,714	42,314	41,881	41,542	41,542
Facilities	1,359,492	1,642,758	1,891,419	2,135,010	2,278,663	2,531,412

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Total School Based Expenses	10,516,077	13,303,191	15,127,495	16,740,904	18,235,634	20,056,661
Contribution for Regional Office Services	1,261,929	1,596,383	1,815,299	2,008,908	2,188,276	2,406,799
	12%	12%	12%	12%	12%	12%
TOTAL EXPENSES w/Reg. Office Contribution	11,778,006	14,899,574	16,942,794	18,749,812	20,423,910	22,463,461
TOTAL OPERATING SURPLUS/DEFICIT	596,565	1,022,675	1,286,420	1,476,926	1,382,535	1,882,139
Surplus as % of Total Expenses	5%	7%	8%	8%	7%	8%

Financial Projections
Lynn *Elementary* School
(Grades K-4)

Updated 7/9/14

	FY2014	FY2015	FY2016	FY2017	FY2018	FY2019	FY2020
Year of Operation	-1	0	1	2	3	4	5
# Students	0	0	120	240	360	480	600
# Staff	0.0	1.5	20.6	35.8	50.3	63.5	78.0
REVENUE							
Public - Tuition Revenue							
Tuition - MA DESE	-	-	1,475,149	3,009,304	4,604,234	6,261,759	7,983,742
Transportation - MA DESE	-	-	6,728	13,860	21,413	29,408	37,862
Public - Tuition Revenue	-	-	1,481,877	3,023,163	4,625,648	6,291,166	8,021,605
Public - Other State Revenue							
SPED DOE 240 Fund	-	-	29,934	61,663	95,270	130,837	168,453
MassHealth Medicare	-	-	1,033	2,129	3,289	4,517	5,815
Public - Other State Revenue	-	-	30,967	63,792	98,559	135,354	174,268
Public - Federal Revenue							
Title I Grant	-	-	48,392	99,687	154,016	211,516	272,326
Federal Nutrition Program	-	-	51,993	107,106	165,479	227,258	292,595
Title II - Part A Teacher Quality	-	-	1,083	2,231	3,446	4,733	6,094
E-Rate Grant (technology)	-	-	-	-	-	-	-
Federal Formula Grants	-	-	101,468	209,024	322,942	443,507	571,015
Charter School Start-Up Grant (via KIPP Fdn)	-	68,360	182,680	148,960	-	-	-
Other Special Grants (i3, RTTT, etc.)	-	-	-	-	-	-	-
Federal Start-Up & Special Grants	-	68,360	182,680	148,960	-	-	-

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Public - Federal Revenue	-	68,360	284,148	357,984	322,942	443,507	571,015
Private - Annual Fund	-	-	57,836	118,080	150,673	177,739	200,634
Private - Growth Capital	-	38,245	400,000	325,000	375,000	100,000	-
Private - Bldg Capital Campaign Pmts for Operations	-	-	-	-	-	-	-
Private Revenue Total	-	38,245	457,836	443,080	525,673	277,739	200,634
Other Income							
Interest & Other Income	-	-	3,421	3,421	3,421	3,421	3,421
Student Lunch Fees	-	-	10,000	10,000	10,000	10,000	10,000
Student Uniform Fees	-	-	3,600	7,200	10,800	14,400	18,000
Other Student Fees & Fundraising	-	-	10,000	10,000	10,000	15,000	15,000
Other Income	-	-	27,021	30,621	34,221	42,821	46,421
TOTAL REVENUE	-	106,605	2,281,848	3,918,640	5,607,042	7,190,587	9,013,942
EXPENSES	FY2014	FY2015	FY2016	FY2017	FY2018	FY2019	FY2020
Personnel - Base Salaries							
School Leadership Salaries	-	-	167,850	171,207	174,631	248,124	253,086
Core Academic Instruction	-	-	475,000	963,500	1,346,502	1,703,296	2,115,987
Other Instruction Salaries	-	-	50,000	102,000	199,040	302,021	415,385
Special Education Salaries	-	-	181,078	311,691	452,507	591,263	644,657
Student Services Salaries	-	-	86,010	100,995	171,546	174,977	269,029
School Operations Salaries	-	30,766	120,995	155,053	217,334	212,201	286,383
Stipends	-	-	7,000	14,000	21,000	25,000	25,000
Bonuses	-	-	25,540	39,175	52,225	64,150	77,200
Personnel - Base Salaries	-	30,766	1,113,474	1,857,622	2,634,785	3,321,031	4,086,728
Personnel - Other							
Benefits	-	4,120	114,688	191,335	271,383	342,066	420,933
Payroll Taxes	-	976	44,539	74,305	105,391	132,841	163,469
Worker's Comp Insurance	-	-	479	799	1,133	1,428	1,757
Professional Development Fees	-	-	13,750	13,900	14,317	14,747	15,189
Consultants	-	-	5,000	10,000	15,000	20,000	25,000
Personnel - Other	-	5,095	178,456	290,339	407,224	511,082	626,348
Direct Student Expenses							
Food Service	-	-	80,050	164,902	254,774	349,890	450,483
Transportation - School Based	-	-	44,781	92,249	142,525	195,734	252,008
Transportation - Extracurricular	-	-	20,101	41,409	63,976	87,861	113,121
Student Uniforms	-	-	4,746	9,777	15,106	20,745	26,709
Medical Supplies	-	-	558	1,150	1,777	2,441	3,142
Textbooks & Instruct. Materials	-	-	8,934	18,404	28,434	39,049	50,276
Instructional Supplies	-	3,000	15,076	31,056	47,982	65,896	84,841
Fees (Student Trips, Activities,	-	-	38,043	78,369	121,080	166,283	214,090

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Sports, Electives)							
Schoolwide Test/Assessments	-	-	1,675	3,451	5,331	7,322	9,427
Copiers (Lease & Maintenance)	-	-	7,211	14,854	22,950	31,518	40,579
Printing	-	5,000	67	138	213	293	377
Furniture (Non-Capitalized)	-	-	70	144	222	305	393
Technology (Non-Capitalized)	-	-	3,658	7,535	11,641	15,987	20,583
Teachers' Choice	-	-	6,750	13,500	18,000	23,000	27,500
School Ldr Discretionary Fund	-	5,000					
Direct Student Expenses	-	13,000	231,720	476,938	734,012	1,006,323	1,293,528
Administration							
Insurance (except Work Comp)	-	-	8,601	17,201	25,802	34,403	34,403
Payroll Services	-	719	9,878	17,143	24,096	30,450	37,403
MTRS – Payments	-	-	8,456	15,114	21,882	28,481	36,035
Staff Recruitment Fees	-	10,000	11,735	12,087	12,450	12,823	13,208
General Supplies	-	-	3,909	8,052	12,440	17,084	21,996
Postage & Shipping	-	1,000	456	939	1,451	1,993	2,566
Staff Rewards	-	-	1,749	3,126	4,526	5,891	7,453
Food	-	-	1,593	3,282	5,070	6,963	8,965
Travel	-	10,000	11,988	21,058	30,489	39,688	50,213
Phone & Internet Service	-	-	4,412	7,886	11,417	14,861	18,802
KIPP License Fee	-	-	14,751	30,000	30,000	30,000	30,000
Interest on Bank Loan	-	-	-	-	-	-	-
Furniture (Capitalized)	-	10,000	42,000	42,000	42,000	42,000	42,000
Technology (Capitalized)	-	10,000	56,800	56,800	56,800	56,800	56,800
Administration	-	41,719	176,327	234,688	278,423	321,436	359,842
Facilities							
Rent/Financing Payment	-	-	191,769	391,209	598,550	814,029	1,037,887
Utilities	-	-	25,588	52,712	65,152	71,580	73,728
Maintenance & Repair	-	-	6,332	13,043	20,152	27,675	35,632
Cleaning Services	-	-	8,168	16,287	24,906	33,927	43,681
Cleaning Supplies	-	-	-	-	-	-	-
Real Estate Taxes	-	-	-	-	-	-	-
Facilities	-	-	231,857	473,252	708,760	947,211	1,190,927
Total School Based Expenses	-	90,581	1,931,834	3,332,839	4,763,204	6,107,083	7,557,373
School Contribution for Regional Office Allocation		10,870	231,820	399,941	571,585	732,850	906,885
		12%	12%	12%	12%	12%	12%
TOTAL EXPENSES with Regional Office Contribution		101,450	2,163,654	3,732,779	5,334,789	6,839,933	8,464,258
OPERATING SURPLUS/DEFICIT		5,155	118,195	185,860	272,254	350,653	549,684
Surplus as % of Total Expenses		5%	5%	5%	5%	5%	6%

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10.5 Facility – Describe the facility that will be used to meet the school’s needs and how it is accessible to individuals with physical disabilities and able to accommodate all students, and if modifications will be required.

KIPP:MA’s Facilities Capacity: KIPP:MA has demonstrated strong capacity to meet the challenge of securing multiple facilities for its schools in Lynn and Boston. KIPP has shown that it can plan, execute, and finance a major new school building facility project. Our 68,000sf Lynn High Rock Building co-locating Lynn middle and high schools won the Boston Business Journal’s 2013 Best of Boston Real Estate Award for a non-profit project that exemplified excellent, cost effective design. KIPP:MA’s strong real estate team includes the sophisticated and active board Facilities and Finance Committees, solid business operations staff, a proven private fundraising team, KIPP Foundation real estate advisors, and contracted consultant Bob Baldwin, a well-respected charter school real estate expert instrumental in the KIPP Lynn High Rock facility and other peer charter school projects. For financing, KIPP has strong relationships with a range of bank lenders, community development institutions, and New Market Tax Credit providers. In Boston, KIPP has a project underway to build a new 54,000sf facility in Mattapan to permanently house elementary and middle grades K-8. In Lynn and Boston, KIPP also has a track record of securing temporary facilities during school startup until permanent facilities come on line. As with all of our buildings to date, all future facilities will be modified as necessary to be accessible to individuals with physical disabilities and able to accommodate all students.

Expanding Facilities for Lynn Grades 5-12: During FY14, KIPP is now completing build out of intentionally unfinished space at its High Rock facility in Lynn to accommodate additional needs and proposed larger enrollment for grades 5-12. Using remainders from the original project budget, KIPP is completing a ~\$650K renovation to add seven classroom spaces to the existing building, all coming on-line for the FY15 school year, accommodating 850 students. In addition, the High Rock campus has capacity and planning is underway to add additional facilities to accommodate the proposed larger enrollment in this charter amendment.

Adding Facilities for Lynn Grades K-4: KIPP has a major search in process to secure temporary and permanent facilities required for our proposed new elementary grades K-4. With five grades of 120 students planned, the total 600 proposed K-4 students would require approximately 55,000sf of space when fully enrolled.

For elementary grades, we expect to phase up through temporary facilities before securing permanent facilities. KIPP has identified and is conducting due diligence on a promising lease facility in Lynn to launch elementary grades during Year 1 (FY16) and Year 2 (FY17). Located just ¾ of a mile from our 90 High Rock St facility, the 176 Franklin St. property is a former Lynn Public School building now owned and being renovated by a developer interested in leasing to KIPP. The 15,000sf, three-story building can accommodate two grades totaling 240 students, with 10 classrooms of 24 students each, plus additional breakout rooms, offices, etc. Initial lease terms appear affordable and lead time is sufficient to complete renovations to open in August 2015. We are currently testing programmatic viability, zoning and permitting, and other issues.

Regarding long term solutions for elementary grades in Year 3 and beyond, we are confident in our ability to identify sufficient facilities beyond 176 Franklin St. (or other temporary alternative) to house grades K-4 through to scale. Permanent solutions may include long-term lease or ownership, with latter potentially via renovation or new construction. This could include housing all 600 students in a single building or across two sites. A survey of the Lynn real estate market indicates that our facility needs can be met within our budget, including cost of improvements. Opportunities range from: Commercial leases for space which would probably require substantial

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fit up in the range of \$5-\$10 per square foot; Commercial building acquisition values of \$60-\$80 per square foot, also requiring substantial investment to convert to school space; and Land acquisition opportunities at approximately \$500,000 per acre. KIPP has modeled various scenarios to test sustainability and the organization's capacity to afford capital and occupancy costs.

10.6 Transportation – *Describe how transportation services are provided to all eligible students, and if modifications will be required. Please note: charter schools must notify the district providing transportation no later than February 1st prior to the start of the school year of all transportation needs, including any changes resulting from the granting of an amendment.*

In Lynn, the Lynn Public School District can provide standard, daily transportation of Lynn charter school students to and from school. To date, KALCS has contracted a private bussing company (Healey Transportation) to provide daily bussing for middle school students and has submitted for transportation reimbursement. In addition, some students are driven by parents and others, particularly in older grades, walk or use public transportation paid for by KIPP. Instead of school bussing, high school students can access MBTA passes provided by KIPP.

As we add elementary grades in Lynn, KIPP currently plans to continue outsourcing transportation but may at some point consider both district bussing and outsourcing options. While our current outsourcing approach has to date worked successfully and we are continuing in FY15 with a longstanding vendor, we may revisit all options as we examine what is best for students at all grade levels. (If district bussing is explored, KIPP would contact and work with Lynn Public Schools as proactively as possible to allow for sufficient planning and resourcing). For temporary and permanent facilities in future years, KIPP Academy Lynn Charter School will plan and execute agreements with either the district bussing service or private contracted service for daily transportation for all eligible students and ensure compliance with all transportation requirements, including those who are physically challenged.

By February 1, 2015 before elementary grades open, a detailed transportation plan will be developed and provider in place with written agreement. The expanded enrollment proposed for existing grades 5-12 will not create a material change to our transportation plan for middle and high school.

ATTACHMENTS

A. Leadership Bios

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Attachment A: Leadership Bios

Leadership Team

Caleb Dolan – *Executive Director*

Caleb Dolan started teaching in 1996 and has been a KIPPster since 2000. He co-founded, led, and taught at KIPP Gaston College Preparatory for eight years. GCP's first three graduating classes earned 100% college acceptance. From 2009-2011, he served a dual role as Chief Academic Officer for KIPP Massachusetts and Director of Principal Development for the KIPP Foundation. Since the 2011-2012 school year, Dolan has served as Executive Director of KIPP Massachusetts. Dolan graduated from Colby College and lives in Boston, MA with his wife Joanna and daughter Tallulah.

John Kalafatas – *Chief Operating Officer*

Mr. Kalafatas joined KIPP Massachusetts as COO in January 2011 to support its growth to a Massachusetts region of public charter schools. He brings 20 years of experience leading mission-driven organizations to greater impact, sustainability, and scale. Prior to KIPP, John served as Portfolio Manager at the Edna McConnell Clark Foundation, which invests in organizations serving low-income youth. At City Year, Inc., a national service and education organization, John served as a Regional Director and as Director of Strategic Planning & Organizational Development. John has also worked as a nonprofit consultant with Kubler Wirka, a corporate fundraiser at the Harvard Development Office, and a Senior Associate at the Duke and Harvard centers for social entrepreneurship. A member of Outward Bound's National Board of Advisors, John is a graduate of Tufts University, Harvard Business School, and the National Outdoor Leadership School. He resides in Reading, MA with his wife Karen and daughter Becca.

Jennifer Parkos – *Chief Development Officer*

Ms. Parkos joined KIPP Massachusetts in January 2010 as Chief Development Officer responsible for developing and implementing the strategic fundraising and marketing plan to support KIPP's growth from one middle school in Lynn to a region of public charter schools throughout Massachusetts. She and her team are responsible for private philanthropy for the annual operating fund and capital campaign, as well as branding and marketing for KIPP Massachusetts. Ms. Parkos brings over 25 years of experience in both the corporate and nonprofit sectors in strategic alliances, business development and fundraising. Prior to KIPP, as National Director of Resource Development for City Year, Director of Membership and Marketing for WGBH, and Director of Development at The Greater Boston Food Bank, Ms. Parkos was responsible for developing and driving the success of major gifts, corporate and foundation giving, and direct mail fundraising strategies and the infrastructure to support them. Having seen both of her children *to and through college*, Ms. Parkos currently resides in Newburyport MA.

Emily Rodriguez – *Director of Leadership Development*

Emily Rodriguez joined KIPP Massachusetts in 2012 as the Director of Leadership Development. Prior to joining KIPP, Mrs. Rodriguez spent seven years working with two highly successful charter school management organizations in New York City, Success Academies and Explore Schools (ESI). Mrs. Rodriguez began as the

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Dean of Students at Explore Charter School, ESI's flagship school, before being promoted to the role of Upper School Academic Director. During her tenure as Academic Director, student test scores increased 23% in ELA and 25% in math. Mrs. Rodriguez most recently served as the Director of Literacy for the ESI network, which consists of four elementary schools and one middle school. At Success Academies, Mrs. Rodriguez served as the founding principal of SA 3 elementary school. During her time as principal, the school earned an "A" rating on the NYC Department of Education's school report card and student test scores were 30% higher than the NY State average. Mrs. Rodriguez began her career as a middle school teacher, working in public schools in NYC and Philadelphia. She is a graduate of the University of Miami and holds masters degrees from Queens College and Pace University. Mrs. Rodriguez lives in Boston with her husband, Ventura, and their three children, Isaac, Sabina, and Nia.

Christine Barford – *Founding Principal, KIPP Academy Boston Middle School*

KIPP Academy Boston is led by Jamaica Plain resident Christine Barford. Ms. Barford comes to KIPP Massachusetts from KIPP Gaston, where she was a 5th grade writing teacher for two years, Dean of Instruction for one year, and School Principal for two years. She previously served as Instructional Coach at both KIPP Academy Lynn Middle School and KIPP Academy Lynn Collegiate High School. Her tenure as Middle School Principal at Gaston College Preparatory has prepared her to bring solid experience and leadership qualities to KIPP Academy Boston. Ms. Barford is a graduate of Gettysburg College (2006), and earned her Master of Education degree from National Louis University in 2009.

Anna Breen – *Principal, KAL Middle School*

Ms. Breen grew up in Connecticut and graduated from Wellesley College with a degree in Environmental Science. She began her teaching career in 1996 as a Teach for America corps member in Washington Heights, New York. After fulfilling her 2 year TFA commitment, she moved on to KIPP Academy in the Bronx, where she taught 7th and 8th grade science, math, and English for five years. She moved to Virginia and taught math and science in a public school for one year before moving back to Massachusetts in 2004 to help found KIPP Massachusetts as the 5th grade math teacher. In 2006, Ms. Breen was promoted to the role of Assistant Principal of KAL, and now serves as KAL Principal. She lives in Lynn with her husband Nat and daughter Serena.

Drea DeAngelo – *Founding Principal, KAL Collegiate High School*

Ms. DeAngelo holds a Bachelor's degree in mathematical sciences from Colby College. She is the Founding School Leader of KAL Collegiate High School which opened in August 2011. She began her teaching career in 2003 as a Teach for America corps member in Phoenix, AZ, teaching math to 9th - 11th graders. During this time, she helped initiate the International Baccalaureate Program and served as the head girls' cross country coach and the JV girls' basketball coach. At KAL, she taught 7th grade math, and led both the 7th grade team and the math department. She also coaches the boys' KAL basketball team, who won the Charter School Cup tournament 2009 and 2010. Ms. DeAngelo's success as a math teacher was celebrated in the summer of 2009 when she was awarded the prestigious KIPP Excellence in Teaching Award. Ms. DeAngelo lives in Lynn.

Emily DoBell – *Founding Principal, KIPP Academy Boston Elementary School*

Emily DoBell holds a Bachelor's Degree in history and economics from Hollins University in Roanoke, VA. She is the Founding School Leader of KIPP Academy Boston Elementary School which opens in August 2014. She began her teaching career in 2006 in North Carolina as a special education teacher. She then taught special education in

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Virginia where she coached middle school and JV volleyball and redesigned the functional life skills curriculum. Mrs. DoBell joined KIPP in 2009 as a math teacher at Gaston College Preparatory in Gaston, NC. She joined KIPP MA as the founding special education teacher at KIPP Academy Boston, which opened in August 2012. Mrs. DoBell lives in Roxbury, MA with her husband Josh.

Eveleen Hsu – *Founding Principal, KIPP Academy Lynn Elementary School*

Ms. Hsu will be the Founding School Leader of KIPP Academy Lynn Elementary School. She began her teaching career in the Cambridge Public Schools as an English teacher to 7th and 8th graders. She has spent the last 5 years of her career at KIPP Academy Lynn Middle School, teaching 5th grade English Language Arts and leading the 5th grade team. Most recently, she managed and mentored teachers as an instructional coach and helped align the school's English Department across all grades in key literacy strategies. In her time as an instructional leader at KAL, Ms. Hsu's students made over two years worth of growth in reading. Prior to her career in education, she produced international news stories as a broadcast associate for CBS News. Ms. Hsu is a graduate from Harvard College and the Harvard Graduate School of Education. She was born and raised in Massachusetts.

Alexis Rosado – *Director of KIPP Through College Alumni Program*

Ms. Rosado was educated in the first class of KIPP Bronx. She attended Deerfield Academy on a full academic scholarship, and graduated from Brown University. She joined KIPP Lynn in 2009 as the Director of KIPP Through College, where she can apply her experience of being a KIPP alumna to helping our alumni in their transition to and through high school and college.

Board of Directors

Michael Kendall, *Board Chair*

Mr. Kendall is currently serving his third year on the KAL Board. He is a partner in Goodwin Procter LLP's Private Equity and Technology Companies Group, and focuses his corporate finance and securities practice on private equity and venture capital transactions, mergers and acquisitions, public securities offerings and representing emerging growth companies. He advises a variety of companies in industries including software, information technology, telecommunications, information services, biotechnology, healthcare, financial services, and retail. Mr. Kendall is listed in Chambers USA: America's Leading Lawyers for Business, The Best Lawyers in America, Boston's Best Lawyers, and has been recognized as a Massachusetts "Super Lawyer." Mr. Kendall is a graduate of Boston University School of Law and Boston University Graduate School of Management. Mr. Kendall resides in Dover, MA with his wife and children.

Skip Besthoff, *Board Member*

Mr. Besthoff joined the KAL Board in the Spring of 2010. He is a general partner with Castile Ventures, an early-stage venture capital firm in the Boston area, where he focuses on investments in emerging Internet and software companies. During his career, Mr. Besthoff has held multiple positions as a developer, strategist and investor in technology-oriented companies. He was previously a principal at Rho Ventures and started his career at Accenture. He is a graduate of Hamilton College and the Johnson Graduate School of Management at Cornell University, and lives in Carlisle, MA with his wife and two children.

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Doug Borchard, Board Member

Doug is a Managing Director at New Profit. He joined the organization in 2005 and served as Partner and Chief Operating Officer through 2011. In addition to managing New Profit's finances and internal operations, Doug works closely with several of New Profit's portfolio organizations, including Achievement First, iMentor and KIPP. Doug worked as a program and logistics officer with Save the Children, where he was part of a team that started up field operations in the Sudan, and created and managed a multi-million dollar relief and development operation. He has served on the boards of directors of a number of growing organizations, including Venturcom, iMarket, and Computers for Youth, and currently sits on the boards of Achievement First and iMentor, and is a board observer for The KIPP Foundation. Doug graduated from Princeton with a BS in Engineering, and received a Master of Business Administration from the Stanford Business School, where he was an Arjay Miller Scholar.

John Connors, Board Member

Mr. Connors joined the KIPP MA Board in 2012. He is the founder and president of Boathouse, a smart and nimble advertising and digital agency based in Waltham, Massachusetts. He started his career at Hill Holliday working for his father, Jack Connors, and remained until its sale in 1998. Soon after, John left to work for Interpublic as CEO of Zentropy Partners, where he led the roll up of 13 separate Internet service businesses across six countries. In 2001, he and his college teammate left Zentropy together and launched Boathouse. Boathouse is an athletic-minded, team-oriented culture with a 50/50 mix of traditional and digital business. Clients include blue chip brands and dot-com start ups. John received a BA in English from the University of Pennsylvania. John lives in Westwood, Mass., with his wife Larisa, a physician at Brigham and Women's Hospital, and their three children Molly, Mary and Willy.

Amanda Fernandez, Board Member

Ms. Fernandez joined the KIPP MA Board in January of 2014. In her current role as Vice President of Latino Community Partnerships at Teach For America, Ms. Fernandez serves as the primary liaison between TFA and Latino organizations, including recruitment for new corps members at Latino-serving institutions. Ms. Fernandez, who has worked with TFA since 2010, holds an M.S. in Human Resources Education from Fordham University and a B.A. in Journalism and Communications from Western Illinois University. Prior to her work with TFA she worked for the Bridgespan Group where she focused on talent recruitment and organizational development. Ms. Fernandez's professional experience includes more than 20 years in consulting and in-house human resources and a track record of achieving results for organizations focused on attracting, retaining, and advancing diverse talent.

Jim Peyser, Board Member

Mr. Peyser joined the Board in fall of 2012. He currently serves as Managing Partner for City Funds at NewSchools Venture Fund, a non-profit firm that supports entrepreneurs seeking to influence public education. Throughout his career, Mr. Peyser has been an active advocate for education reform and has served as both Chairman of the Massachusetts Board of Education and Under Secretary of Education and Special Assistant to the Governor for Charter Schools. Mr. Peyser also previously held the position of Executive Director of Pioneer Institute for Public Policy Research for seven years. He earned his Master of Arts degree in Law and Diplomacy from the Fletcher School (Tufts University) and a Bachelor of Arts from Colgate University.

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Scott Sarazen, Board Member

Mr. Sarazen has served on the KAL Board for four years and currently leads the Facilities Committee. He is the Global Life Sciences Markets Leader for Ernst & Young, managing the firm's global marketing, communication and go-to-market strategies for the pharmaceutical, biotechnology and medtech industries. Scott has enjoyed over 20 years of experience working directly and indirectly in the life science industries. Prior to joining EY, his career included roles with Straumann, North America and Genzyme Corporation. Scott has also served in public economic development roles, advocating for the expansion of the biomedical industries for the Commonwealth of Massachusetts and as a consultant to the City of Boston. He serves on the board of advisors for the Harvard-MIT Division of Health Sciences and Technology and is active with the Mass Biotechnology Council. He was named one of Boston's 40 under 40 Business leaders by Boston Business Journal. Mr. Sarazen is a resident of Marblehead, MA.

Amanda Seider, Board Member

Ms. Seider joined the KAL Board in 2011. She is currently a Managing Director of Alumni Affairs for Teach For America, an organization that seeks to improve educational opportunities for low-income students by training a talented force of teachers who, as alumni, will work from all sectors to fight educational inequity. Here in Massachusetts, she works to catalyze the impact of nearly 1,000 local alumni of the program, leveraging her extensive experience in leadership development, strategic partnerships, and network building. Ms. Seider began her career as a Teach For America corps member in Atlanta, where she was a fourth grade teacher. She is a native of Dorchester, and a graduate of Boston Public Schools. She holds an AB from Harvard College, and a Master's Degree in Anthropology from Emory University. Ms. Seider lives in Cambridge, MA with her husband, Scott.

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