

**THE FRIENDS OF THE BRONX CHARTER SCHOOL FOR EXCELLENCE, INC.**

**REPLICATION AND EXPANSION OF HIGH-QUALITY**

**EXCELLENCE COMMUNITY CHARTER SCHOOLS**

**PROJECT NARRATIVE**

**TABLE OF CONTENTS**

**I. ABSOLUTE PRIORITIES ..... 2**

    a. Priority 1 – Experience Operating or Managing High-Quality Charter Schools ... 2

    b. Priority 2 – Low-Income Demographics .....6

**II. COMPETITIVE PREFERENCE PRIORITIES .....6**

    a. Priority 1(b) – School Improvement .....6

    b. Priority 2 – Promoting Diversity .....9

        i. (a) Promoting Diversity .....11

        ii. (b) Serving Students With Disabilities .....12

        iii. (c) Serving English Language Learners .....13

    c. Priority 3 – Novice Applicant .....16

**III. INVITATIONAL PRIORITY – RIGOROUS EVALUATION .....16**

**IV. SELECTION CRITERIA .....17**

    a. (a) Quality of the eligible applicant .....17

    b. (b) Contribution in assisting educationally disadvantaged students .....24

    c. (c) Quality of the project design .....33

    d. (d) Quality of the management plan and personnel .....34

    e. (e) Quality of the evaluation plan .....53

**V. APPLICATION REQUIREMENTS (A-O) .....61**

**The Friends of the Bronx Charter School for Excellence, Inc. (FOBCSE)** is an emerging Charter Management Organization (CMO) committed to providing high-quality educational options for students and communities that are historically underserved. Our schools are modeled after our flagship, the Bronx Charter School for Excellence, which opened in 2004, has since received two full-term unconditional renewals (2009, 2014), expanded to a K-8 model, and in 2012 was named a recipient of the National Blue Ribbon Award by the U.S. Department of Education. In order to deliver the high caliber of instructional programs and services that we provide to a larger number of families in need, we developed a CMO to codify our model and improve upon the way that we educate children.

During the 2015-16 school year, our schools served 941 scholars in two schools in two states across three campuses. By the conclusion of the five-year grant period in the 2020-21 school year, we will replicate and expand to serve 2,968 students across 7 elementary schools and 2 middle schools, with a third middle school opening in the fall of 2021. We intend to utilize our funding to support our CMO's strategic growth plan over the next five years to enhance our capacity to support our growing network of schools. Our fundamental goals of replicating our model is to avail greater access to high-quality educational programs to students and families in high-needs communities, and closing persisting achievement gaps that have too long pervaded these communities. Our long-term goal is to leverage the transformative power of education to elevate every student, family, and the surrounding communities that we serve.

## **I. ABSOLUTE PRIORITIES**

### **Absolute Priority 1 – Experience Operating or Managing High-Quality Charter Schools**

FOBCSE currently manages Bronx Charter School for Excellence (BCSE), Stamford Charter School for Excellence (SCSE), and is anticipating the opening of BCSE 2 in the fall of

2016. We were recently approved to open BCSE 3, 4, and 5 in 2017, 2018, and 2019, respectively. We also intend to propose a second Connecticut elementary school to open in 2020 with potential market interest in Norwalk or Bridgeport as long as Connecticut's financial condition, political landscape, and assessment of community need prove favorable.

Each school opens with a K-5 (NY) or PK-5 (CT) charter, and expands to include grades 6-8 in the second charter term during renewal<sup>1</sup>. All of our schools will ultimately offer a full PK/K-8 grade span, but elementary and middle schools will operate with their own separate facilities and faculty. We have planned for opening only one school each year so that we may carefully measure and allocate our resources to incubating each school launch while maintaining quality of the entire network. By the conclusion of our five-year grant period, we will have in operation seven elementary schools, two middle schools, and will be preparing for a third middle school as our programs continue to grow in scale.

Our mission, vision, and programs were developed based on the simple, yet profound principle that *every* child has the ability to succeed. Our schools prepare young scholars to compete for admission to and succeed in top public, private, and parochial high schools by cultivating their intellectual, artistic, social, emotional, and ethical development. We accomplish this by offering a challenging and rigorous academic curriculum, which at the earliest of grades has an eye towards college preparation. To achieve this, our schools create a supportive and caring environment that at all times has high expectations of all students. We offer a differentiated, project-based learning environment that seeks to develop high-level analytic and critical thinking skills in all of our students.

This approach catapulted the success of our flagship, which has continually outperformed

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<sup>1</sup> Connecticut schools are able to offer Pre-Kindergarten because Connecticut includes Pre-K funding in per pupil revenue.

<sup>2</sup> [http://schools.nyc.gov/OA/SchoolReports/2014-15/School\\_Quality\\_Snapshot\\_2015\\_EMS\\_X255.pdf](http://schools.nyc.gov/OA/SchoolReports/2014-15/School_Quality_Snapshot_2015_EMS_X255.pdf)

<sup>3</sup> <http://www.governor.ny.gov/sites/governor.ny.gov/files/atoms/files/NYSFailingSchoolsReport.pdf>

in aggregate the local district, statewide charter schools, and all NYS Public Schools on statewide assessments. Additionally, our scholars have taken and passed 183 high school Regents exams and our graduates are gaining entry into some of New York's most prestigious high schools. Moreover, this year marks the first year our alumni have been eligible to attend college, with acceptances to prestigious schools that include University of Pennsylvania's Wharton School of Business, Cooper Union, Washington University – St. Louis, Emory, UNC-Chapel Hill, and Wesleyan. Based on the success of this model, we have developed a strategic growth plan to safeguard the academic, organizational, and financial longevity of our programs as we continue to expand.

In 2015, SCSE enrolled 168 scholars in grades PK-1 in its inaugural year. In just 9 short months, our young scholars have demonstrated substantial academic gains that place them on a trajectory for success. In reading, 79% percent of our PK scholars, 72% of our K students, and 71% of our first grade, and 77%, 93%, and 75%, respectively, in math are performing at or above expected level based on our preliminary assessments. These figures are based not on the guidelines set by the creators of the assessment themselves, but on the higher benchmark expectation level established by our model, which typically is set at least two levels above norm. While these results are only preliminary, they demonstrate tremendous promise as our scholars continue to advance within our program. Section IV. Selection Criteria (a) Quality of the Eligible Applicant, Appendix E: Schools Operated by Applicant, and Appendix F: Student Academic Achievement provide evidence of our experience operating and managing our portfolio of high-quality charter schools resulting in strong scholarly achievement.

As an organization consisting of an executive leadership staff with over 65 years in the classroom and additional leadership with over 30 years of combined experiences supporting

staff, students and parents, our impact extends beyond the students and families that we serve. We were previously awarded state-funded initiatives to share best practices and resources for improved literacy instruction, and curriculum, teacher, and leadership development that BCSE offered to two neighborhood schools. Our CMO staff has also engaged with fellow charter schools and charter organizations to advance the movement by sharing charter-specific knowledge and best practices at statewide and national conferences, as well as organizing our parent and community partners to advocate for the charter movement and equitable education for all children.

Although our educational programs accelerate student achievement with a sense of urgency, our organizational and financial models operate with a conservative approach in order to safeguard our long-term endurance. As our authorizer reports will attest, BCSE has remained organizationally and fiscally viable. The education corporation/Board of Trustees is the steward of the charter and maintains effective oversight, with an unrelenting focus on the quality of the educational program. The Board continues to operate in substantial compliance with the terms of its charters, by-laws, applicable state and federal law, rules and regulations. Our schools are established with a well functioning structure with staff, systems, and procedures that allow the school to operate in a sound manner. Similarly, we have successfully maintained adequate financial resources to support successful school operations, and maintain accumulated net assets at healthy levels. Our annual financial audits return without any significant deficiencies or material weaknesses. Likewise as a startup, SCSE has managed sufficient organizational integrity and financial resources to deliver an effective educational program and ensure increasingly stable finances as the school continues to grow in scale and capacity. Moreover, our abundant waiting lists ensure that we maintain full enrollment in our programs for per pupil

revenue. We will continue to remain vigilant over our academic, organizational, and financial health to ensure the long-term success of our programs.

**Absolute Priority 2 – Low-Income Demographic**

In the 2015-16 school year, FOBCSE served 941 scholars at BCSE and SCSE combined. Of the 773 scholars attending BCSE, 75% of our children enrolled from low-income families based on qualifications for free- and reduced-priced lunch. Similarly, of the 168 children enrolled at SCSE, 73.2% attended from low-income families. This equates to approximately 74.4% of our network’s student population. The following table illustrates the percentage of students at each school qualifying for free/reduced price lunch for the past five years:

	<b>2011-2012</b>	<b>2012-2013</b>	<b>2013-2014</b>	<b>2014-2015</b>	<b>2015-16</b>
BCSE	77%	79%	76%	76.4%	75%
SCSE	N/A	N/A	N/A	N/A	73.2%

Additional information about the demographic composition of our student populations can be found in Appendix H: Additional Information.

**II. COMPETITIVE PREFERENCE PRIORITIES**

**Competitive Preference Priority 1(b) – School Improvement**

In its infancy, BCSE was a small start-up school that struggled to meet its performance objectives. In 2007, Charlene Reid joined the staff and was appointed Principal, and later, Head of School. Within five years, BCSE went from a school in danger of failing, to becoming the highest performing charter school in the state, and the fourth highest performing K-8 public school in all of New York State, including all traditional public schools and charter schools. BCSE was the only school among the top 5 that was not a gifted and talented or specialty school model, which rely on selective admissions. BCSE also received the US DOE’s highest accolade as a 2012 recipient of the National Blue Ribbon Award in the category of “Exemplary High

Performing Schools”. To this day, BCSE remains a Substantial Progress School in Good Standing, thus allowing us to participate in dissemination activities to support schools that are struggling.

To that end, from 2013-2016, BCSE participated in a three-year, state-funded partnership with a local priority struggling district school through a state Dissemination Grant to share best practices and resources for improved literacy instruction in the early childhood grades.

Additionally, we recently submitted a second proposal for a Dissemination Grant in conjunction with another district school to promote several proven successful practices related to parent engagement and involvement, pedagogical training, and support for common core based school assignments designed to increase parent knowledge of support strategies for early scholarly development in the home. Our staff has also engaged with fellow charter schools and charter organizations to advance the movement by sharing charter-specific knowledge and best practices at statewide and national conferences, as well as participating in a variety of advocacy events.

Moreover, our schools welcome visits from prospective parents, legislators, funders, community members, and existing and potential school operators to observe our practices firsthand and learn about the services we provide to our families. Finally, FOBCSE is deeply committed to evidence and research-based innovative practices as a component of educational reform. Our studies are frequently published and shared in educational journals. Of additional note, FOBCSE is also remaining vigilant of opportunities to become a New York State Independent Receiver, which would allow us to support Priority Schools that have been in the most severe accountability status since the 2006-07 school year, designated as “Persistently Struggling Schools”.

FOBCSE is an organization of excellence. We have a deep desire to constantly improve our academic model and operations. We have a “test and learn” approach or R&D methodology that is guided by rigorous research designs, which we use to innovate our academic model regularly. This approach to R&D allowed the flagship to test innovative ideas in a controlled manner. At the network scale, this creates an immediate impact upon our practices, informs our policy decisions, and confirms the validity of our best practices. It has a more widespread and potentially national impact with our partner schools and organizations on teacher pedagogy and practices, a distal impact with scaled school-wide implementation, and long-term impacts that extend beyond our contracted partnership terms. At a larger scale, our research findings are disseminated in presentations at regional and national conferences, and through publications in education and academic journals. While our immediate concern is in improving our model at our schools, through publications and presentations we are also able to have a more global impact on other schools, higher education, and other educational partners.

As a CMO that evolved from the success of its anchor school and with a leadership staff that transitioned from school-based to central office positions, FOBCSE is deeply committed to collaborating with both its public and non-public peer schools in order to share best practices and afford all families with high quality educational options, regardless of their child’s school of enrollment. Our targeted communities host several priority, struggling, persistently struggling, and persistently dangerous schools, some of which are on the brink of shuttering or conversion. Despite their efforts and best intentions, these schools have continued to struggle to meet the needs of their children, their families, and their communities. Because we believe that every child deserves access to high-quality educational programs, we consider it our civic duty to extend a collaborative hand to our struggling neighbor schools in an effort to share practices that

have proven successful for the children and families we serve. As our CMO and schools continue to grow to capacity, we will continue our relentless pursuit of excellence and intend to seek opportunities to share best practices that will allow all children to flourish, particularly those who are educationally disadvantaged.

### **Competitive Preference Priority 2 – Promoting Diversity**

The Friends of the Bronx Charter School for Excellence, Inc. is committed to serving a diverse population of students and families representative of the demographics of the communities we serve, and our replication schools will share that same commitment. Our open enrollment policies and lottery practices are designed to ensure equitable access for all students and are guided by applicable local, state, and federal regulations. This includes the admission of students who have historically suffered from achievement gaps and are described in section 1111(b)(2)(C)(v)(II) of the ESEA.

FOBCSE schools accept applications from legal guardians of all age and grade eligible students. Our schools do not discriminate on the basis of race, ethnicity, sex, gender identity or expression, religion, ability, native language, or sexual orientation. Across our network of currently operating schools, 84.4% of our scholars are of Hispanic or Black/African American descent, 7.4% are English Language Learners, 10.1% of our scholars have identified disabilities, and 74.4% qualify for free/reduced price lunch. As Table H.5 in Appendix H illustrates, our schools serve a higher percentage of low-income and minority students, slightly lower percentages of students with identified disabilities, and comparable rates of English language Learners when compared to New York state averages.

Our schools maintain an inclusive program that deliberately individualizes instruction to meet the needs of every learner. The curriculum allows instruction in the foundational skills

necessary for success in later grades, while supporting learning on a wide spectrum of proficiency levels. Using ongoing and real-time data, teachers and support staff identify students' current performance levels, advance achievement in their zone of proximal development, and monitor outcomes to inform further instruction. Every child has a personalized learning plan that provides evidence of the student's achievements, strengths, areas in need of improvement, goals, and progress. This applies to the most accelerated learner in the class, to the most reluctant and struggling student, to the student who is learning English, and the student who has special needs. This approach allows teachers to uniquely tailor instruction to authentically address the learning needs of every student. Additionally, our schools frequently collect data, which is analyzed in aggregate, and disaggregated by student, class, grade level, and pertinent subgroups, to include special populations. These measures not only allow teachers to monitor student, class, and grade level progress to inform instructional planning, but the school to evaluate curriculum, program, and instructional efficacy as well. In turn, this continual evaluation of program effectiveness allows the leadership and Board to maximize appropriate resource allocations.

The transformative power of education and the high quality instruction students receive at our schools have the power to eliminate the racial/ethnic and socio-economic isolation and disparities in disadvantaged students' achievement that many families of high needs communities have endured. Please refer to Appendix F: Student Academic Achievement and Appendix H: Additional Information for more detailed data on our student demographics and subgroup performance as compared to the district and state.

Our goal is to alleviate racial, ethnic, and economic isolation by providing a diverse student body with a strong foundation of skills and knowledge in literacy and mathematics, and the capacity to think critically, creatively, and globally to compete for admission into top

schools. Our schools engage students in a challenging and supportive environment where every student will attain success. The model's rigorous and holistic curriculum, differentiated instructional strategies, and culture of accountability will ensure the success of every scholar. FOBCSE schools alleviate racial, social, and economic pressures that detract from learning and healthy development with comprehensive strategies, including a uniform policy, character development, celebration of cultures, and supportive resources such as counseling, health management, and interventions for students with disabilities and English Language Learners.

(a) Racial and Ethnic Diversity - Like our existing schools, we expect to attract, enroll, and retain a diverse population of learners in each of our replication schools that is reflective of the host district and surrounding region. Although our schools tend to attract higher percentages of minority families, our admissions process is race-neutral. Enrollment is based on a blind lottery, and the schools do not enact enrollment preferences beyond those for returning students, siblings, in-district residents, and children of employees. In the Bronx borough, Black and Hispanic residents account for 98% of the population. In 2014-15, BCSE's minority students of Black/African American and Hispanic/Latino descent accounted for 82% of our student population, compared to our host district's 84%, and neighboring districts' 85% and 95%. Our economically disadvantaged students accounted for 78% of our student population, compared to our host district's 75%, and neighboring districts' 82% and 90%. Similarly in Stamford, 89.9% of our SCSE scholars in 2015-16 were of Black/African American and Hispanic/Latino descent compared to the district's 57.3%. SCSE students who qualified for free or reduced lunch comprised 73.2% of our student body, versus the district's comparative rate of 52%. However, as schools seeking to close achievement gaps for historically underserved populations that are located in districts with large percentages of minority and economically disadvantaged residents,

it is understandable that our schools would attract a higher percentage of students of color and economic disadvantage seeking better options. FOBCSE continually emphasizes that all children, regardless of race/ethnicity and socio-economic circumstance, should have equitable access to high quality educational options. Our recruitment strategies are designed to raise public awareness and invite families of all backgrounds to apply.

In accordance with enrollment and retention targets established by New York State, our plan includes recruitment of the general population as well as targeted outreach in communities populated by families of economic disadvantage, English language learners, and families of children with special needs. We have not enacted an enrollment preference for special populations at this time. However, we deliberately concentrate recruitment activities in high needs communities to attract and retain a student body that is reflective of the district, to include comparable or greater enrollment of subgroups such as economically disadvantaged students (FRPL), students with disabilities (SWD), and English Language Learners (ELL).

(b) Serving Students With Disabilities - FOBCSE will continually emphasize to all families that the school's policies support open enrollment, non-discriminatory practices, and an inclusive educational model. Targeted outreach to specific populations such as families with children identified with special needs or English language learners receive more specific information about the programs and services that our schools offer. Additionally, the schools ensure that comprehensive information is always available on standing marketing materials, such as the school's website and social media pages. This allows families to access the information at any time. Our network enrollment of students with disabilities represents 10.1% of our scholars, compared to the host district's 21% in the Bronx and 9.9% in Stamford. Although our enrollment rates of SWDs is lower than our Bronx host district, this is likely in part attributable

to our resistance towards historical trends of the over-identification of struggling students, as well as a reflection of our success in exiting students from requiring special services.

FOBCSE schools mainstream students with special needs in an inclusive, least restrictive environment, where students receiving special education services mandated in their Individualized Education Plans (IEPs) are provided those services within the general education environment. Additionally, our schools provide services including: Integrated Co-Teaching (ICT), Special Education Teacher Support Services (SETSS), Counseling, Speech, Occupational Therapy and Physical Therapy. As with our ELL population, our students with disabilities receive support in addition to, rather than in lieu of, the regular course curricula. This way, all students are able participate in activities with their non-disabled and English proficient (for ELLs) peers.

(c) English Language Learners – FOBCSE schools educate ELLs following a model of Structured English Immersion (SEI). SEI is based on the theory that children learn a second language best when they are integrated with other children who speak that language with native-speaking ability. The SEI model requires daily English Language Development (ELD). ELD is a type of instruction that has as its orientation the teaching of English language skills to students who are in the process of learning English. It is distinguished from other types of instruction in that the content of ELD emphasizes the English language itself. ELD instruction focuses on phonology (pronunciation - the sound system of a language), morphology (the internal structure and forms of words), syntax (English word order rules), lexicon (vocabulary), and semantics (how to use English in different situations and contexts). ELD is foundational for English language acquisition work, since listening, speaking, reading, and writing tasks conducted in English are considerably more difficult in the absence of knowledge about how English operates.

Students of limited English proficiency receive the same academic content as those students who are native English speakers. All instruction is in English, however, the level of English used for instruction - both verbal and written - is modified appropriately for any ELLs. Additionally, ELLs are not forced to stop using their primary language while learning English. Our reading curriculum has been proven highly effective in educating ELLs. We provide all needed staff and specialized curricular materials to enable ELLs to achieve proficiency. Our network's ELL population represents 7.4% of our student population, when compared to its host district's 21% for the Bronx and 16% for Stamford.

A staff member with expertise in providing services for ELLs is employed at each school to monitor progress and ensure that classroom teachers have the tools they need to ensure the success of their students. A designated ELL staff member meets regularly with grade level teams to discuss strategies, interventions, and individual student progress. Staff members trained in providing services for ELLs also lead push-in and pull-out instruction in each classroom with the goal being for them to succeed in a structured immersion setting. Our staff directly provides or makes referrals to appropriate support services which may be needed by ELLs in order to achieve and maintain a satisfactory level of academic performance.

Teachers, especially early grade teachers, receive professional development on teaching strategies and learning modalities for students designated as English Language Learners. Also, within the school's daily class schedule are blocks of time that are used for more intensive English language instruction for ELLs (as well as for other individualized support for students with different needs). Our schools are prepared to address the needs of students who are struggling with the structured English immersion program by providing, if it is determined to be

the best course of action, ESL pull-out instruction and/or assignment to an educational associate or teacher who speaks that child's non-English language.

Outreach Strategies - Our schools engage the community and host events such as open houses and meetings with the students, families, and community members. As community members play a critical role in the growth and development of the school, we also strive to develop lasting relationships with members and organizations within the various communities to support our scholars and programs beyond the initial recruiting year. Whenever possible, we also elicit the support of bilingual staff members to support the recruiting efforts for families whose native language is one other than English.

As a part of FOBCSE's outreach process every year, the operations team is responsible for advertising in local media outlets. During this time, bilingual staff members visit various early childhood education centers to distribute applications and share knowledge about what the schools have to offer. Our applications are translated into Spanish, Bengali, and prevailing languages within our targeted communities to reach out to those families who may not read, write, or speak English with proficiency. Additionally, the outreach process includes having translated information on our website and brochures.

Our schools utilize a variety of strategies to attract a diverse student body and broaden the scope and depth of recruitment efforts with outreach, which may include:

- Meetings with representatives of the local and surrounding districts, as well as community-based organizations to establish a positive rapport and cultivate a collaborative relationship
- Attendance at open houses, public meetings, meet-and-greets, and presentations at various community organizations such as preschools, daycare centers, head start

programs, ESL programs for adults with school-aged children, county health centers, doctors' offices, libraries, family service providers, housing authorities and associations, counseling centers and support groups, tutoring groups, and places of worship (churches, mosques, temples, etc.)

- Neighborhood canvassing, especially in areas with higher concentrations of public housing developments and multicultural communities
- Distribution of flyers and mailings in English, Spanish, Bangla, and prevailing languages
- Local media stations (radio and internet) that target both English and non-English speaking audiences

FOBCSE anticipates that students will enter school from an array of backgrounds and with a spectrum of learning needs. The school has deliberately been designed to address the needs of diverse learners entering the program with a variance in skills, knowledge, strengths, and deficits. Our schools embrace a culture that celebrates the diversity of its students, staff, and community, while cultivating a unified vision for the school. It is our intent to continue to these practices to ensure equitable access to all children.

### **Competitive Preference Priority 3 – Novice Applicant**

As a new CMO, FOBCSE has never received, or been a member of an applicant group that received a federal Replication and Expansion grant. FOBCSE has also not had an active discretionary grant from the Federal government within the past five years. Although BCSE 2 has been approved to receive CSP funds from the state to support start-up, we are certain that our funding requests through this federal grant are not in duplicate or redundant for any initiatives covered by state CSP awards. Therefore, FOBCSE qualifies as a “novice” applicant.

### **III. Invitational Priority – Rigorous Evaluation**

The Friends of the Bronx Charter School for Excellence Inc. is deeply committed to supporting and assisting all network schools in becoming high performing schools where scholars are well-rounded, critical thinkers. In order to do so, we conduct research and evaluations of innovations and practices piloted in our schools. Our research designs, where possible, employ the gold standard controlled randomized trial design. Our research projects demonstrate our goals and commitment to education reform. We hope to share findings from our projects with the broader education community in academic conferences and in journals for practitioners. We will continue to pursue rigorous evaluations of our model that will, if well implemented, meet What Works Clearinghouse Evidence Standards.

#### **IV. SELECTION CRITERIA**

##### **(a) Quality of the Eligible Applicant**

The Friends of the Bronx Charter School for Excellence (FOBCSE) is an emerging charter management organization (CMO) that serves high needs populations and has consistently demonstrated for several years its ability to promote scholarly achievement at rates that exceed peer school performance locally and statewide. Our vision for academics, school culture, community partnerships, and adherence to sound business and organization structures undergirds the success of its flagship school, Bronx Charter School for Excellence (BCSE), and serves as the foundation for replicating the model in the historically underserved New York City borough of the Bronx and Stamford, Connecticut, identified as a Priority and Alliance School District due to persisting achievement gaps.

Our mission is to prepare our students to compete for opportunities in the best high schools, colleges, and chosen careers. It is, therefore, critical that our students receive a solid foundation of the essential knowledge, skills, and habits for success. The short-term benefits

allow students to engage with exciting curricula and increased achievement as they advance in grade levels. The long-term benefits become apparent when students who graduate from our program are accepted into high performing high schools, colleges, and their chosen careers. As the communities that we serve have higher percentages of families living in poverty, these opportunities can be the transformative keys to elevating individual students, families, and the community out of socio-economical and educational poverty. Our purpose in replication and expansion is to ensure that more children have greater access to these pathways.

The sections below outline FOBCSE's eligibility as an applicant for the Federal CSP Replication and Expansion Grant by providing information about the current schools in its portfolio and describing the process of serving similar populations as it replicates its model.

(1) Significantly Increasing Student Academic Achievement

*Bronx Charter School for Excellence (BCSE)*

Tables F.1-F.6 in Appendix F: Student Academic Achievement illustrate BCSE's performance on English Language Arts (ELA) and Math state exams during the past three years, while Table F.7 shows performance on high school level Regents exams. Data is provided in aggregate and disaggregated by grade and subgroup.

Our schools provide a significant educational benefit to the scholars and communities we serve. In 2013, NYS began to measure proficiency in the Common Core Learning Standards (CCLS) for ELA and Math exams, thereby instituting a higher level of assessment rigor. While proficiency rates in meeting and exceeding grade level expectations declined universally across the state, BCSE continued to outperform their local and statewide peers, in some cases significantly by at least 20-30 percentage points. BCSE scholars also outpaced aggregate proficiency rates of NYC Region Host Districts and Charter Schools, NYS Host Districts and

Charter Schools, and all NYS Public Schools in ELA and Math. Additionally, over 60% of our 8<sup>th</sup> grade scholars have passed NYS Regents High School Exams across multiple content areas with passing rates ranging from 88% -100%, placing them well on their way to success.

As our authorizer's Renewal Recommendation Report (dated January 16, 2014) will support, BCSE has continually surpassed nearly all accountability measures, significantly outperformed the local district on statewide assessments, maintained a higher comparative performance than expected to a large degree than schools that are similar based on economically disadvantaged populations, and remained in "Good Standing" each year under NCLB accountability measures. Our scholars have also made adequate yearly progress (AYP) each year for every subgroup and content area. Moreover, BCSE has consistently received A's and B's on New York City Department Of Education (NYC DOE) Progress Reports since 2008, and was identified as a "Reward" school under the ESEA accountability designations for the 2015-16 school year.

*Stamford Charter School for Excellence (SCSE)*

SCSE opened in the fall of 2015 serving 168 students in grades PK-1. As a school that is growing one grade level each year, SCSE scholars have not yet reached grade levels eligible to sit for statewide exams. We have been monitoring student progress using the Developmental Reading Assessment (DRA) and Curriculum Based Assessments for Math.

As Tables F.8 and F.9 of Appendix F indicate, within just nine months, our scholars have demonstrated significant gains, both in reading and mathematics. It should be noted that for our DRA expected levels of achievement, it is our practice, in accordance with our higher standards of academic expectations, to set our targets two performance levels above the norm. The figures in the table represent the percentage of students at each grade level who met or exceeded the

recommended grade level target, as well as the higher SCSE grade-level target. Additionally, we typically expect at least 85% of our scholars to attain the higher grade-level target during each test administration. However, as a first-year school filled with scholars who have only benefitted from months, not years, of our instructional model, we set forth a 75% target for each of our schools in their first year of operation, with the expectation that performance will increase in subsequent years. As we see in Table F.8, the majority of our aggregate and subgroups attained the widely accepted DRA level, and most of our scholars met or came close to meeting the higher SCSE expected level. We see few instances where there are gaps in performance between aggregate and subgroup performance that are greater than 10 percentage points. In some instances, as is the case with Pre-kindergarten students qualifying for FRPL or Black/African American first graders, some of our subgroups performed at a higher rate than their non-educationally disadvantaged peers. In math, we expect our scholars to achieve 80% proficiency or higher. In aggregate, 81.3% of our PK-1 scholars attained this goal. None of our subgroups performed less than 10 percentage points below grade level aggregates, and in some instances, including K and 1<sup>st</sup> grade scholars with disabilities, Kindergarten Hispanic/Latino scholars, and Black/African American first grade scholars, their proficiency rates were higher. These rates are very promising. As our students continue to grow within in our programs and gain traction, it is encouraging to see that most of our scholars are already making significant gains.

FOBCSE will continue to replicate the key design elements, strategies, and best practices that have proven successful, particularly for students who have been underserved by traditional district schools. The program is designed specifically to address the individualized needs of the students and promote maximum achievement for every learner.

## (2) Closing Historic Achievement Gaps

Our mission, vision, and programs have specifically been designed to provide the necessary supports, challenges, resources, and learning environment to ensure that *every* child has equitable opportunities for success. Stamford and Bronx have demonstrated persisting trends of achievement gaps for English Language Learners, and low-income, minority, and special needs students, which FOBCSE intends to mitigate.

FOBCSE's educational programs allow multiple points of entry, providing accessible and supportive, yet challenging and rigorous instruction that targets every student's needs. Our success relies heavily on the versatility of the curriculum and instructional strategies that support research-backed best practices. Key strategies include an inclusive, smaller learning environment with reduced student-to-teacher ratio of 15:1; the use of real-time data to inform flexible, differentiated, instructional groupings uniquely tailored to each student; and personalized learning plans that provide evidence of each student's achievements, strengths, areas in need of improvement, goals, and progress.

Tables F.4-F.6 in Appendix F illustrates BCSE's subgroup performance on state exams during the past three years. All of BCSE's subgroups, to include students with disabilities, English Language Learners and economically disadvantaged students, made adequate yearly progress (AYP) for each year and for every subject. Our subgroups also outperformed the host district and state at nearly every grade level for ELA and Math. Additionally, NYC DOE releases annual School Quality Snapshots that depict each school's performance based on their framework for driving student achievement. BCSE met its target in one category, and exceeded targets for all of the remaining elements, including criteria for closing achievement gaps<sup>2</sup>.

Finally, Table F.7 in Appendix F shows our scholarly performance on NYS High School Regents

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<sup>2</sup> [http://schools.nyc.gov/OA/SchoolReports/2014-15/School\\_Quality\\_Snapshot\\_2015\\_EMS\\_X255.pdf](http://schools.nyc.gov/OA/SchoolReports/2014-15/School_Quality_Snapshot_2015_EMS_X255.pdf)

content exams, both in aggregate, and disaggregated by subgroup. Our results reveal that all of our scholars including subgroups demonstrated passing rates ranging from 88% to 100%.

As previously noted, we do not yet have access to comparative analyses of our SCSE scholars to district, state, or national performance rates. However, our preliminary data indicates a promising trajectory of achievement with very few instances of large gaps between aggregate and subgroup performance, and in some areas where our subgroups outperform the majority. We will continue to monitor student progress using standards-aligned assessments to ensure that our young scholars remain on a pathway to success.

### (3) Comparisons of Low-Income and Educationally Disadvantaged Students to the State

In subsections a (1) and a (2), we demonstrated our schools' capacities to close achievement gaps and promote scholarly success on statewide tests at rates that are significantly higher than local district peer schools. As Tables F.5-F.6 in Appendix F show, BCSE's subgroup performance on ELA and Math exams as compared to NYS illustrate a similar trend. Close examination reveals that BCSE scholars outperform their peers in aggregate, as well as in nearly every subgroup at nearly every grade level for each year reportable data is available. As BCSE is located in and, thus, enrolls a higher percentage of students who reside within CSD 11, this is significant as it suggests that students who are considered "educationally disadvantaged" are performing on a higher trajectory at BCSE than they would have had they attended local district schools, demonstrating that our scholars are on the pathway to excellence.

Table H.2 in Appendix H displays the demographic composition of BCSE, Community School Districts 10, 11, and 12 (the host districts for our flagship and intended districts for our Bronx replication schools), and New York State for the 2014-15 school year, the most recent year for which data was available for comparison. This table illustrates that BCSE enrolls

comparable percentages of American Indian/Alaskan natives, higher percentages of African-American and Asian students, and lower percentages of Hispanic/Latino and White students. BCSE has similar percentages of economically disadvantaged students, and somewhat lower percentages of students with disabilities and limited English proficiency.

Our population of students eligible for FRPL has remained consistent with figures reported by the local district. As seen in Table H.6 of Appendix H, we saw an increase in our ELL and SWD populations in 2012-13, and observed a slight decline in 2014-15. We attribute this in part to the success of our model as students have advanced through our program and tested out of criteria, particularly our SWD scholars. Based on historical patterns, we anticipate that many of our ELL scholars will likewise be declassified as they gain language proficiency within our programs. We will continue to focus our outreach efforts in high-needs communities to ensure that we are providing equal access and enrolling comparable proportions of students in these target populations.

Table H.4 shows the demographic composition of SCSE compared to Stamford school district and the state of Connecticut. Additionally, Table H.5 illustrates that of the entire network. Tables H.6, H.7, and H.8 show our record of enrolling and retaining special student populations for the past five years. Table H.9 shows our history of retaining BCSE students each year.

In order for students to benefit from the instructional programs that we provide, daily attendance and participation are essential for maximizing gains. Instruction is also optimized through consistency when students enroll and remain within the program as they advance through the grade levels. Table H.7 in Appendix H shows our average daily attendance rate as compared to the state. This shows that, based on the most recently reported figures, our average

daily attendance rates surpass that of the New York's average with 97.3% versus the state's 93%. Additionally as shown in Table H.8, BCSE has had decreasing rates of student attrition, with a 2014-15 school year attrition rate of 1.6%.

This is the first year that BCSE alumni are eligible for high school graduation and college acceptances. While it is too early to determine the percentage of students who graduated on time, we do have several BCSE scholars who graduated from our program and have been accepted to reputable high schools and colleges. The preliminary high school placement list includes 31% attending parochial high schools, 6% attending day and boarding schools, 10% attending charter high schools, and 53% attending competitive public high schools, including specialized high schools. This year also marks the first year our first cohort has been accepted to college, with our scholars receiving offers from prestigious schools that include: University of Pennsylvania's Wharton School of Business, Indiana University Kelley Business School, UNC-Chapel Hill, Tulane University, St. John's University, Seton Hall, Cooper Union, Washington University-St. Louis, Emory, and Wesleyan. BCSE, and more specifically our dedicated high school placement coordinators, supports each family to identify the best high school for their child, ensures each scholar has acquired the necessary credentials and passed the requisite assessments for entry, and assists in navigating the application process. This intensive support is particularly significant for families whose children will be the first in their families to graduate from high school and compete for seats in colleges and universities.

**(b) Contribution in Assisting Educationally Disadvantaged Students**

FOBCSE believes that *every* child should have access to free, high-quality educational options, particularly students who are educationally disadvantaged and historically underserved. We believe that this is not just an option, but also a moral obligation to future generations.

Success should not be constricted by an absence of quality options based on socio-economic instability or geographical restrictions. Education is one of society's great equalizers with the power to transform a child from socio-economic, academic, and emotional poverty to success in achieving lifelong goals. Quality educational environments such as BCSE and its replications have the power to bring together families and generations to transform entire communities where every individual is focused and invested in safeguarding future generations. In order to furnish students with the tools they need for success, it is essential that we close persistent achievement gaps and offer greater access to a larger host of families in high-need communities. We intend to avail these options through our plans for replication.

FOBCSE is not a "conform or fail" model. It is truly a community-based organization operating on the social justice platform of providing equitable educational opportunities in high needs communities. Our schools provide high-quality, rigorous instructional programs that accelerate scholarly achievement with a personalized touch. Our families enroll and stay with our programs because we cultivate a family within the learning environment, one that embraces parents as educational partners. We intend to deliver our promise of providing excellent schools that are deeply entrenched in and committed to the communities we serve, ensuring that each school is replicated effectively with the level of excellence that has distinguished our model.

FOBCSE schools offer a Free Appropriate Public Education to all of our students with disabilities. Pursuant to federal and state regulations, no student at our schools is subjected to discrimination, particularly on the basis of a disability. The Individuals with Disabilities Education Act (IDEA) requires all Local Education Agencies (LEAs) to educate students with disabilities in accordance with all laws and regulations. FOBCSE schools are fully and transparently compliant with the laws governing the educational rights of our scholars, especially

students with disabilities, English Language Learners, and economically disadvantaged populations.

Unless otherwise indicated, charter schools are deemed to be LEAs for all federal funding programs. Likewise, both New York State and Connecticut recognize charter schools as independent, autonomous public schools and LEAs. However, for the purposes of special education, the district of residence serves as the LEA, with charter schools treated as schools of the district. For special education, the New York City Department of Education is the LEA for our Bronx schools (more specifically, NYC Geographic District # 11) and the Stamford Public School District is our LEA for SCSE.

Friends of Bronx Charter School for Excellence is replicating its successful model in geographic areas that serve students who are educationally disadvantaged and have historically received below standard education. This is most evident by the achievement gaps that prevail and persist for students in each of our targeted communities.

The Bronx borough has a long history of underperforming schools, including several that have been placed on priority and focus lists, identified as struggling and persistently struggling, and persistently dangerous schools. According to the NY State Education Department (NYSED) in 2015, of the 178 “priority” and “failing” schools in the state, 91 were located in New York City, and Bronx County had the largest concentration of schools with 44. Of the 40 New York City schools that have been failing for 10 or more years, 20 of them were in the Bronx<sup>3</sup>. Additionally, there were 144 “struggling” and “persistently struggling” identified schools, including 62 New York City schools<sup>4</sup> with 32 located in the Bronx. Twelve of those 32 schools in the Bronx were sited in CSDs 10, 11, & 12, our current and future host districts in New York.

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<sup>3</sup> <http://www.governor.ny.gov/sites/governor.ny.gov/files/atoms/files/NYSFailingSchoolsReport.pdf>

<sup>4</sup> <http://nysed.gov/news/2015/commissioner-elia-identifies-144-struggling-and-persistently-struggling-schools-begin-FOBCSE>

The list of schools deemed “persistently dangerous” based on violent and disruptive incident reporting (VADIR) included 32 schools, 27 of which were located in New York City with the largest number, 13, operating in the Bronx. Of these 13 schools, 6 were located in CSDs 10, 11, and 12.

Similarly when we established SCSE, all of Connecticut’s schools had been classified under Connecticut’s State Department of Education’s (CSDE) new accountability system. The CSDE identified Stamford Public School District (SPSD) as a Priority School District for the 2013-14 school year<sup>5</sup>, making it one of thirty Alliance Districts with the lowest-ranked statewide District Performance Indexes (DPI). According to SPSD’s Performance Report for 2012-13<sup>6</sup>, students did not perform at or above the “goal” level on the majority of Connecticut Mastery Tests (CMT). In Connecticut, an achievement gap is defined by a disparity of at least 10 DPI points between achievement of the majority of subgroups and the aggregate group in a district (excludes High Needs). Overall performance on the CMT revealed the district failed to achieve several targets for minority, low-income, disabled, and non-English proficient students with significant disparities when comparing aggregate performance to that of subgroups.

In 2014-15, Connecticut adopted the Smarter Balanced assessment. While SCSE does not yet serve students eligible for testing, Table F.10 presents the current state of progress in Stamford and Connecticut, and the achievement gap that continues to persist. As evident in the table, students who are educationally disadvantaged face a very grim prognosis. The disparities between the performance of Connecticut’s high needs students (defined as students who are eligible for FRPL, or who qualify as SWDs and ELLs) and not high needs students is glaring.

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<sup>5</sup> Connecticut State Department of Education. (2013). *Priority school program*. Retrieved from <http://www.sde.ct.gov/sde/cwp/view.asp?a=2618&q=321612&sdePNavCtr=#45478>

<sup>6</sup> Connecticut State Department of Education. (2013). *Connecticut district performance report for school year 2012-13*. Retrieved from [http://www.csde.state.ct.us/public/performance-reports/Reports/Dist\\_135.pdf](http://www.csde.state.ct.us/public/performance-reports/Reports/Dist_135.pdf)

Approximately only 1/3 of high needs, Black, or Hispanic students achieved proficiency in ELA, versus the 3/4 not high needs students, and 2/3 White students. In math, between 1/6 and 1/7 of high needs, Black, and Hispanic students achieved proficiency, versus 3/5 not high needs, 1/2 White, and 2/3 Asian. SPSD produced lower rates of students meeting and exceeding targets on both ELA and Math exams, with 49.4% of students achieving proficiency in ELA, versus the state's 55.4%, and 37.5% achieving proficiency in math, versus the state's 39.1%. Students with disabilities and English language learners had the lowest rates, with less than 10% achieving proficiency. SPSD remains listed as a both an Alliance and Priority school district, further highlighting the persistent achievement gap, which FOBCSE intends to ameliorate. While our school does not enact enrollment preferences to any particular subgroup, our schools will concentrate particular efforts to support the needs of children in special populations who have been traditionally underserved by the district

At BCSE and SCSE, we have maintained diverse student populations. Tables H.1 and H.3 in Appendix H exhibit the demographic compositions of each host city versus the state, and Tables H.2 and H.4 illustrate the demographic composition of each FOBCSE school as compared to host districts and statewide averages. These tables illustrate that our schools enroll comparable, and sometimes higher rates of educationally disadvantaged students. However as our record of student achievement will attest, our programs are designed to accelerate the learning for all scholars. Our instructional programs are designed to promote scholarly achievement to meet and exceed State academic content and achievement standards to prepare them to compete for seats in the high schools, colleges, and careers of their choosing. Section IV (a) and the supporting tables in Appendix F and H provide evidence of our success in assisting educationally disadvantaged students to excel beyond their district and statewide peers.

The schools in FOBCSE's growth plan reflect our mission, vision, and intent to transform the educational landscape of the community. We will address the achievement gaps that have pervaded the district's schools and provide a positive, supportive, and challenging learning environment where every child will succeed. With an eye towards college and career readiness, FOBCSE schools utilize a holistic approach to cultivate scholarly habits, 21st century global thinkers, and offer a broad liberal arts curriculum to promote students' intellectual, artistic, social, emotional, and ethical development. Our schools also establish a highly accountable culture where all stakeholders are dedicated to the success of the students.

At FOBCSE schools, *all* students are held to high performance expectations and all students receive a free appropriate public education in an inclusive environment. Our programs are able to reach students at an early age when fundamental and rudimentary skills are acquired. We designed a matrix of school-wide standards and performance benchmarks to guide instruction and monitor student progress throughout the course of their enrollment. The matrix was designed to ensure that students make adequate progress throughout the year, and comprehensively articulated to ensure progress as they advance to subsequent grade levels. These standards for student achievement are aligned to the CCLS to secure a solid foundation upon graduation from the school's program, preparing students towards college- and career-readiness, and encompass and incorporate all facets of student learning to ensure the holistic growth of each child.

The academic program is rigorous and nurturing to support every child to achieve his or her maximum potential by targeting students' needs in their Zone of Proximal Development.<sup>7</sup> This applies to the accelerated learner, the most reluctant and struggling student, the student who

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<sup>7</sup> Fisher, D., & Frey, N. (2010). Scaffolds for learning: The key to guided instruction. In *Guided instruction: How to develop confident and successful learners* (chapter 1). Retrieved from <http://www.ascd.org/publications/books/111017/chapters/Scaffolds-for-Learning@-The-Key-to-Guided-Instruction.aspx>

is learning English, and the student who has special needs. FOBCSE's program is designed to challenge every student with highly supportive and sophisticated differentiation. Flexible instructional groupings uniquely tailored for every child's needs are available daily and based on ongoing real-time data. The Integrated Co-Teaching (ICT) and Grade Cohort Model distinguish FOBCSE's instructional delivery and "the pod." The teaching pod is essentially a grade-level team of teachers, specialists, and therapists that are collectively responsible for all students in that grade. While each teacher is assigned a classroom of students, they also know the performance of students outside of their rooms since a large percentage of instruction occurs via leveled small groups. Students benefit from more individualized instruction that foster deeper levels of understanding through intensive discussions and interactions. Because our collaborative approach ensures that each grade level "pod" is accountable for the achievement of the entire grade level cohort, differentiation occurs not only within one classroom, but across classrooms in order to address a broader spectrum of needs. Teachers also utilize technology, cooperative learning and multisensory, hands-on, and inquiry-based activities to support varying modalities of learning. Teachers also use differentiated strategies and modalities to build upon students' strengths and strengthen any areas of deficit. Each student has a comprehensive portfolio that allows teachers to monitor student progress.

Literacy is the core competency that is emphasized, and the FOBCSE model reflects a dedication of time and resources to reading, writing, and math — with approximately two hours spent daily on ELA and on math. The longer school day enables FOBCSE to also offer science, social studies, as well as many specials (such as Spanish, music, computer science, art, etc.). In general, the schools aim at teaching reading two levels beyond current grade. The schools also

supplement with other resources as is necessary, such as the use of targeted reading materials for intervention. At FOBCSE, all teachers teach reading.

The pedagogical tool of the teaching pod and the inherent, intense teacher collaboration, are key ingredients to FOBCSE's academic success. Teachers work in a tight unit to mentor each other, to improve the curriculum, to analyze data, and to address each child's individual needs. Through this methodology, remediation is offered in real-time with rapid response based on ongoing data collection.

The faculty and instructional leadership use a great deal of data to manage the small groups and to monitor progress. Assessments include quarterly DRAs, ITBS twice per year, curriculum-based unit and weekly assessments in ELA and math, state exams, and student portfolios with common rubrics. Student performance data is discussed constantly in the pods, at common planning times four times a week, and with an actively engaged instructional leadership team. School-wide data is analyzed in aggregate and disaggregated by student, class, grade level, and pertinent subgroups, to include special populations. These measures allow teachers to monitor student, class, and grade level progress, and the school to evaluate curriculum, program, and instructional efficacy as well. In turn, this continual evaluation of program effectiveness allows the leadership and Board to maximize appropriate resource allocations.

The schools advance student achievement by creating a culture that inculcates positive work habits and develops lifelong scholars. Students feel safe, interconnected, and empowered to take educational risks to stretch the boundaries of their learning. FOBCSE schools foster character development and encourage students to continuously "RISE UP" and demonstrate the virtues of Responsibility, Integrity, Success, Etiquette, Unity, and Pride. FOBCSE also emphasizes the values of Respect, Citizenship, Teamwork, and Honesty with a College-Bound

Attitude. These virtues and values provide a common vocabulary for school-wide expectations and permeate the daily nurturing interactions within the school community. Additionally, we utilize the 16 Habits of Mind<sup>8</sup> (listed in Appendix H), which teach the essential skills, habits, and positive attitudes that cultivate lifelong scholars and success in middle school, high school, college, and chosen careers. By middle school, students use the Overcoming Obstacles curriculum in an advisory setting that leads to the desired outcome of “balanced freedom.” Finally, all students wear uniforms to create a sense of unity, and to detract from sources of potential distraction.

FOBCSE’s program is reflected in twelve key design elements, which summate our school model and serve as the cornerstones of our quality instructional programs. These components distinguish the model and are replicated in each school. They are: High academic standards; Data-driven instruction and flexible groupings; A broad liberal arts education; Foundational academic and critical thinking skills that expand to a 21<sup>st</sup> century global perspective; A longer school day; Performance-based compensation for staff; Clearly articulated standards for students that encourage holistic growth; School uniforms for students; A commitment to academic performance accountability; Parent engagement; Open collaboration with the community of educators and external stakeholders; and, Organizational commitment to life-long learning and to the professional development of all staff. These core tenets were carefully established to provide an educational program relevant to the Common Core Learning Standards and the diverse student populations we serve. The key design elements serve as the hallmarks of our schools. Ultimately, the goal of the model is to help students gain access into high-performing secondary

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<sup>8</sup> Costa, A., & Kallick, B. (Eds.). (2009). *Habits of Mind Across the Curriculum: Practical and Creative Strategies for Teachers*. Alexandria, VA: Association for Supervision and Curriculum Development. Retrieved from <http://www.ascd.org/Publications/Books/Overview/Habits-of-Mind-Across-the-Curriculum.aspx>

and post-secondary institutions. FOBCSE remains vigilant on college- and career-readiness, and works backwards to figure out what students need to achieve success.

Professional development for teachers includes in-house training as well as externally facilitated workshops and graduate credits. There is pre-service training in August, approximately one day each month for in-service, and ongoing professional development. Themes include: improving content knowledge, pedagogical skills, and individualized professional growth. Each teacher has a personal growth plan and receives regular feedback from instructional leaders on daily walk-throughs. Teachers submit action plans for their own improvement each year. Teachers receive abundant training, but also provide the school with 200 hours of non-classroom community service (100 hours of professional development activities and 100 hours in leadership activities such as leading clubs for students, specialized tutoring, faculty projects, parent engagement, community education workshops, etc.).

FOBCSE is able to have such a strong culture for students because of its relationship with parents. This element of its academic model is robust with progress reporting sent out twice a month at grades K-4 and once a month at grades 5-8. Each year, there are parent orientations, associations, and workshops to lever the work students are doing at school. There is also a reserved seat on each school Board for the Parent Association President. Parent engagement and investment is so critical to us, that we have included it as one of our key design elements.

**(c) Quality of the Project Design (10 points)**

(1) Project Goals, Objectives, and Outcomes

FOBCSE has established the following overarching specific, measurable, and attainable goals to achieve over the five-year grant period.

Goals/Objectives	Outcomes	Measures
To grow the FOBCSE network of	Expanded enrollment of the existing	FOBCSE will successfully expand

schools through the expansion and replication of the flagship model in New York and Connecticut to accommodate the demand for greater access to enrollment seats	<p>SCSE from 168 to 448 and add a Middle School as students advance in grade levels, increasing a total of 280 new seats and 5 grade levels</p> <p>Replicated BCSE’s K-8 model, starting with elementary schools that expand into middle school programs with 4 replication schools in NY and 1 in CT, creating 1,710 new seats for a network total of 2,968 scholars across 7 elementary schools and two middle schools</p>	<p>SCSE, launch BCSE 2-5 and a second CT school, and add middle schools to each elementary school as they grow in capacity</p> <p>FOBCSE’s network of schools will accommodate its total enrollment target of 2,968 scholars by school year 2020-21 across 7 elementary schools and 2 middle schools</p>
To provide a high-quality educational program that accelerates scholarly achievement, particularly for our educationally disadvantaged students, to prepare our students to compete for opportunities in the best high schools, colleges, and chosen careers	Each school in the FOBCSE network will achieve, or minimally make annual progress towards achieving, the academic accountability performance goals set forth in its charter	Each school’s performance will be measured by the accountability goals set forth in its charter in accordance with statewide exams and performance benchmarks

An expanded version of our proposed evaluation plan, which includes our specific goals, objectives, and outcomes, is incorporated as sub-Section (e) of this narrative. Our timeline for expansion and replication is illustrated in Appendix H, Table H.19.

**(d) Quality of the Management Plan and Personnel**

FOBCSE has a thorough plan for expanding, replicating, and maintaining high-quality schools to meet the ever-growing need. FOBCSE will be increasing in size and expertise to enhance the services we provide to each school and distribute the roles and responsibilities amongst our growing staff to match the growing needs of the network.

**(1) Management Plan**

FOBCSE has established a strong management plan to ensure that we effectively achieve the objectives of our project on time and within budget, with clearly defined roles and responsibilities, timelines, and milestones for accomplishing each task. Figure H.20 in Appendix H illustrates our CMO’s organizational structure, while Figure H.21 shows our school-based staffing plan. As an emerging CMO, we are filling each position strategically as we continue to

grow in scale. FOBCSE will support the academic, organizational, and fiscal success of the schools in its portfolio by leveraging the expertise of the central staff and maintaining a close working relationship with the schools' governing boards and administrators.

The CMO is in a start up phase, with a modest staff of senior executives, secondary, and tertiary roles that were appointed during the 2015-16 school year. Key personnel include the CEO, the Senior Director of Teaching and Learning, Senior Director of Operations, and Regional Director of Operations, along with financial consulting services provided by the Charter School Business Management team. Secondary and tertiary team members include a Grant Writer/Director of Special Projects, Instructional Support Specialist, Business Manager, Director of Family and Community Engagement, Director of Alumni Services, Director of Human Resources, and Facilities Manager. As the staff grows, our dependence on external contractors will be phased out with the addition of permanent staff members.

Our CMO staff operates under three key domains: Academics, Operations, and Finance, with a subsidiary branch for Development. Under each of these are various core functions carried out by a team of experts. FOBCSE provides an array of support services, with examples listed in Table H.22 of Appendix H. In this model, the COO's purview includes student recruitment/community relations, facilities acquisitions and maintenance, compliance, HR (back office and recruitment), and technology. The Director of Finance/CFO's responsibilities include all financial aspects and work with the development team. Last, the CAO's purview includes all school level activities, R&D, and data management. All principals will report to the CAO once identified, though in early years of this plan, the CEO and Director of Teaching and Learning will continue to provide this supervision and guidance until the CAO is appointed. FOBCSE ensures quality replication by hiring and training staff who are highly qualified with a track

record of success, and aligned to our mission and vision. Because the CMO is intended to safeguard the model, FOBCSE provides the framework for each school, while school-based leadership manage the daily operations. By centralizing key functionalities, we benefit from the economy of scale, and we allow our schools to focus on what they do best: educate children.

Our management of school replications occurs in three primary phases: Greenlighting, launching, and sustaining. The first phase is accomplished by the CMO and is the process of evaluating key factors to determine if a particular market is suitable for a replication school. The entire process requires approximately 24 months from market launch to school opening. Our Outreach team assesses community engagement, authorizer relations, conducts soft student outreach, and researches available facilities in the targeted community. At 18 months, market scoring occurs and we begin identifying funders, facilities, and begin student outreach. During this period, charter applications are submitted and preliminary budgets are developed. By 12 months prior, we have a school leader selected and entering the leadership training with the CEO. We also conduct a human capital assessment and secure fundraising commitments. At this point, the CMO gradually shifts to a supportive role to the leader in preparations for the school's opening. At 6 months prior to school opening, student outreach transitions to student enrollment and the schools take final actions to prepare for opening, such as procurement of furniture and curriculum resources. As the majority of our replication schools identified to open in the next five years have already been approved, we begin the timeline with these major functions already completed, with the majority of these functions performed by the Operations team under the supervision of our Senior Director of Operations and CEO.

The following timeline illustrates approximate dates and timeframes for some of the key pre-opening activities.

Personnel: CEO = Chief Executive Officer DCFE = Director of Community and Family Engagement SDO = Senior Director of Operations RDO = Regional Director of Operations DTL = Director of Teaching and Learning CFO = Chief Financial Officer (currently a consultant) DD = Director of Development GW = Grant Writer	SP = School Principal OM = Operations Manager FM = Facilities Manager BM = Business Manager DHR = Director of Human Resources DMA = Development and Marketing Associate
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Task/Activity	Milestone	Timeframe	Person/Team Responsible
<b>GREENLIGHTING</b>			
<b>Market Launch</b>			
Community Assessment & Engagement	Initial assessment of climate, landscape and need for charter school; Establishing relationships with community members	24 months	CEO, DCFE
Authorizer Relations	Building knowledge of charter trends, understanding requirements for proposals		CEO, GW
Soft student outreach	Assessing community demand/need		DCFE, DMA
Facilities Assessment	Real estate studies to identify potential facilities		SDO
<b>Market Scoring and Greenlighting</b>			
Local fundraising assessment	Identify potential local funders	18 months	DD, GW, CEO
Facilities identified	Facility identified, lease negotiated, initial inspection, plans for remodeling begin		CEO, SDO
Student Outreach Launched	Active marketing and outreach begins with distribution of marketing materials, advertisements, online publications, meetings with community members to establish enrollment pipelines		DCFE, DMA
		12 months	
Human Capital Assessment	Positions for key school-based personnel posted		HR, DMA, SP
Secured regional commitments	Fundraising complete		DD, GW
School Leader identified, trained	If Principal has not already completed pipeline training, this training commences with on site training in one of the existing schools		CEO, SP
File for Federal 501(c)(3) Status for School and State Tax Exempt Status	Each school receives 501(c)(3) status	Sept-Dec Yr. 0	BM, SDO
Community Outreach	Networking, community outreach, building relationships, and seeking endorsements	Ongoing	DCFE, BM, DMA
Student Outreach continues	Marketing for students continues, applications submitted for lottery	6 months	DMA, RDO, SP
All preopening activities occur	Curriculum, furniture, technology procured; plans for pre-service training in progress; school calendars, meal plans, transportation coordinated with district	6 months	SDO, SP

<b>Task/Activity</b>	<b>Milestone</b>	<b>Timeframe</b>	<b>Person/Team Responsible</b>
Extra-curricular Activities	After-school activities determined, calendar items scheduled		SP, CEO
PD	Faculty participate in pre-service training		CEO, DTL
Classroom Assignments	Faculty prepare classrooms for school year, students assigned to homerooms		SP
<b>LAUNCHING</b>			
<b>General</b>			
Staff trained in grant administration	All staff are trained on requirements of grant administration	Sept. – Dec Yr. 1	CEO, COO, CFO, SDO
Ongoing PD for grant management	Staff receive ongoing training for appropriate management of grant funds	Jan-May Yrs. 1-5	CEO, CFO, COO,
Annual Report Prepared and Submitted	Annual reports submitted to the US DOE	June Yrs. 1-5	CEO, CFO, COO, GW
<b>School Facility</b>			
Identification of intended site	Pre-planning for financing, acquisition, renovation,	Jan-July Yrs. 0-5	SDO, CFO, CEO, FM
Facility Acquisition	Finalize financing and acquisition	Jan-July Yrs. 0-5	SDO, CFO, CEO, SP
Facility Renovations	Design and development	Spring/Summer Yrs. 0-5	SDO, FM, SP
Renovation Completion	C of O and all other required documents attained, move-in ready for preliminary administrative staff	Summer Yrs. 1-5	SDO, FM, SP
School Year Begins	School successfully opens first day of school	Sept Yr. 0-5	CEO, SP, OM
<b>Board of Trustees</b>			
Board Recruitment	Network through personal and professional affiliates	Present, ongoing	SB, CEO, DD
Board Training/Strategic Planning/Development	Board orientation, strategic planning, training, possible retreat	Jan Yr. 0 – June Year 1, ongoing	SB, CEO
<b>Staff recruitment and appointment</b>			
Principal recruitment	Recruitment of Principal with hiring firm	July-Dec Yrs. 0-5	CEO, DTL, HR
Principal appointment	Principal appointed after careful screening process	July –Dec Yrs. 0-5	CEO, DTL, HR
Instructional Staff Recruitment	Staff recruited through widespread online and media posting, job fairs, postings, etc.	Jan-May Yrs. 0-5	DTL, SP, HR, CEO, DMA
Instructional Staff hired	Staff hired after careful screening process	Aug Yrs. 0-5	DTL, SP
Staff Professional Development	Pre-service staff development for all members	Summer Yrs. 0-5	DTL, SP, CEO
<b>Students Enrollment</b>			
Recruitment	Three phases of recruitment begins	Dec-Apr Yrs. 0-5	SDO, RDO, DMA, SP
Website development	School website developed with comprehensive information and online enrollment forms available	Dec-Apr Yrs. 0-5	DMA
Enrollment Period	Families submit enrollment forms online and in hard copies	Jan-Apr Yrs. 0-5	RDO
Lottery	Lottery conducted by independent third-party	Apr Yrs. 0-5	Lottery conducted by independent third-party
Transportation	Meetings with district central offices	Spring/Summer	SP

<b>Task/Activity</b>	<b>Milestone</b>	<b>Timeframe</b>	<b>Person/Team Responsible</b>
Meetings		Yrs. 0-5	
Transportation Determined	Based on enrollment, routes and pick up/drop off times determined	Summer Yrs. 0-5	SP, RDO
<b>Curriculum</b>			
Curriculum Development	Selection, development, and refinement of curriculum resources and guiding documents	Jan Yr. 0-ongoing	DTL
Curriculum Units	Based on selections and guiding documents, curriculum units developed initially by leadership, with revisions by full instructional staff in subsequent years	Jan Yr. 0 - Ongoing	DTL, SP
<b>SUSTAINING</b>			
Informal Observations	Instruction is observed to be effective, rigorous, and exciting	Ongoing	DTL, SP
Formal Observations	Teachers deliver meaningful and purposeful lessons	Ongoing	DTL, SP
Data Analysis	Data is compiled and analyzed for instructional implications and program evaluation	Ongoing	DTL, SP
PD	Teachers participate in 200 hours of PD each year	Ongoing	DTL, SP
Daily student and staff attendance	Daily attendance above 95%	Ongoing	SP
Monthly financial report	Monthly P&L, cash flow statements, budget documents	Ongoing	SP, CFO
Programmatic Audits	Evaluation of academic, organizational, and financial programs	Summer Yrs. 0-5	CEO, SDO, CFO, DTL
External Evaluation	FOBCSE will meet and exceed expectation during the external evaluation process	Conclusion	External party

Our timeline for expansion and replication is summarized in Table H.19 of Appendix H. Further information on network enrollment plans are included as Tables H.10-H.18 in Appendix H: Additional Information, and Appendix E: Schools Operated by Applicant, which shows when each school is planned for opening and the enrollment configuration for each year of the grant period. Upon awarding, the CEO will act as the project manager who will oversee the grants administration process and ensure we are fully compliant to its terms.

(2) Business Plan for Improving, Sustaining, and Ensuring Quality and Performance

In its first replication, the executive leadership of FOBCSE drew upon their vast knowledge and prior experiences of operating a high-quality school, BCSE, to build the programs of SCSE. True to our “test and learn” approach, our CMO is in the process of creating

a replication “kit” that codifies the policies, procedures, and model for effective replication, incorporating practices that proved effective in the first replication, and modifying those that would benefit from improvement. This kit provides a blueprint for the successful academic, organizational, and financial management practices for each school to follow in preparation for a successful launch and program implementation faithful to the model. It will also be used as a continual reference to ensure that each school has a sound understanding of the policies and procedures that distinguish the model. This kit is intended as one proactive measure for effective and structured replications, removing the risk of a “trial and error” approach.

FOBCSE uses several barometers of success. In addition to test scores, we also monitor and gauge our performance on organizational and fiscal health, parent satisfaction, and school safety. As each kit provides the benchmark goals, timelines, and processes each school should follow for replication, it is also essential that we implement programmatic audits to evaluate the efficacy of our practices in supporting the needs of our students and learning community. Our objective is to align all resources to optimize scholarly performance, and provide a premier educational program for the community. In order to improve, sustain, and ensure the quality of our replications, we will institute a series of formal and informal audits as an ongoing process and at multiple levels culminating in an annual evaluation of overall school effectiveness. CMO representatives will attend each school’s Board meetings, at which time the schools will report on their academic, organizational, and fiscal performance.

On a monthly basis, the instructional staff, Principal, Education and Accountability Committee of the Board, and CMO will monitor progress towards academic goals. The Operations Manager, Executive Committee and Finance Committee of the Board (Development Committee as needed) will monitor progress towards non-academic goals related to the

operational and financial performance of each school on a monthly basis. Teachers will use progress toward benchmark targets to inform instruction and make short-term adjustments to the curriculum and instructional plans. The CMO, school leadership and Board of Trustees will use achievement data as well as summative analyses of non-academic data to make decisions that include allocations of resources and staff, and programmatic decisions regarding curriculum and personnel modifications.

Academics: Each year, our schools submit an Annual Report of progress to the authorizer/state. These reports detail our performance towards attainment of our academic and non-academic goals outlined in our accountability plan, our performance with consideration to the renewal benchmarks, and the Charter Schools Performance Framework. They are internally compiled by the school leadership team in conjunction with the Board and CMO, allowing the schools to assess programmatic performance, identify priorities, and develop action plans to address any areas of vulnerability and improvement. These reports also include the results of our audited financial statements conducted by an independent third party firm, as well as our assurances and disclosures by the Board. Using these reports, we will be able to measure and monitor our progress towards achieving our goals.

In addition to the aforementioned reports, we will also be engaged in audits conducted by external entities. Our authorizers will conduct periodic site visits to ensure that we are making adequate gains and maintaining fidelity to our charter and mission. These observations are delivered to the Board in the form of Site Visit or Renewal Visit reports. The NYC DOE also conducts its own audit presented in the form of the School Quality Snapshots and Guides, formerly the Progress Reports. These reports provide an overview of NYC schools' practices, environment, and performance. They include information on each school's enrollment, student

progress and achievement, HS readiness, peer school comparisons, and ability to close achievement gaps. Included in these reports are the results of an additional survey conducted by the NYC DOE and completed by parents and students attending the school. Other opportunities for audits performed by external partners include potential board training assessments and strategic planning initiatives whereby the Board evaluates its own performance. Board assessments and strategic planning may be conducted by a third party, which would result in a written document.

Throughout the course of the school year, the school staff, leadership team, and Board use data to develop, improve, and revise curriculum and instructional practices with support from the CMO. The teaching faculty will analyze data during weekly meetings with the school leadership to inform classroom instruction and flexible groupings. Short-term adjustments may be made to the curriculum units and scope and sequence in accordance with students' progress and needs. The leadership team will compile school-wide data to report to the Board and CMO, and analyze its implications towards curriculum, instruction, and personnel decisions. Based on students' performance towards school-wide goals, the Board and leadership team may also implement short-term adjustments. At the conclusion of each year, all data will be thoroughly vetted to evaluate the curriculum and instructional strategies. Based on student achievement data, our schools will devise improvement plans for implementation the following school year. Moreover, staff may also need to modify curriculum units and resources over the summer. Data will also be disaggregated to analyze the performance of any subgroups and evaluate the school's effectiveness in meeting their needs. Additionally, assessment data will be used to make final determinations regarding students' grade level promotion and graduation. Any adjustments

made to the programs will be reflective of students' needs, the CCLS, state exams, curriculum framework, and the pursuit of continual improvement.

During the school year, the CMO and school leadership will provide ongoing support and individualized professional development to its staff through an exchange of observations and feedback. At the conclusion of the year, this information is compiled into annual performance appraisals that assess each teacher's effectiveness in meeting school-wide and professional development plan goals. Likewise, the Board will conduct annual appraisals of the school leader, and the principal will evaluate the leadership staff. This information may be used to conduct an annual assessment of staffing patterns and priorities. Concurrently, the leadership team in conjunction with the Finance Committee of the Board will monitor fiscal soundness, minimally each month, and at the conclusion of the school year, will perform an internal audit for financial planning.

FOBCSE schools will also evaluate the results of parent and students surveys, along with data points such as average daily attendance rates, enrollment and retention rates, and parent attendance at organized functions. This allows the school to monitor parent engagement and satisfaction levels using quantitative data. Disaggregated enrollment and retention rates will inform the school's marketing and outreach plans, helping us make determinations about where to focus efforts to ensure equitable enrollment and retention of demographics comparable to the district, and illustrate whether or not those efforts have been successful.

At the end of the year, the Board and CMO will review the data collected throughout the year and analyze its implications to make programmatic decisions, which may include the extension of the management contract. The data will also be used to measure achievement, and/or progress towards established academic and non-academic goals, which will indicate

whether or not the programs have been successful. As a child-centered organization, the operational and fiscal performance focuses on making decisions to support the success of all scholars. As the steward of the school's charter, it is ultimately the Board's responsibility, with support from the CMO, to ensure that the school is successfully achieving its mission, vision, and academic/non-academic goals. As each school year concludes, the Board will participate in strategic planning to objectively assess the school's progress, direction, and future plans.

Human Capital - The FOBCSE culture is one that is guided by the organizational values.

Excellent education is social justice and staff must be extremely committed. The culture for students ensures that it is "safe to be smart" and student routines are highly valued. While the environment for students is strict and purposeful, it is for joyful learning: dances, awards, publishing parties, history days, spirit weeks all are regular routines for students who have done their academic work.

The adult culture of FOBCSE mimics the student culture. Staff will frequently talk about doing their work "by any means necessary" to reach the student where they are and get them on the road to a superior high school and college. This belief system is hallmarked by a "never give up" work ethic, the ability to receive feedback and act on that feedback, the ability to have difficult conversations, patience, humility, a love for urban education and the students, and most of all: a calling to act on social justice in the form of education.

While FOBCSE staff is missionary-like in terms of their zeal and focus, they are also different from several other CMO's — they are individuals who have been trained as career educators. All teachers have Masters degrees and all Educational Associates are certified. Many faculty members also have dual degrees and certifications. The CMO supports each school by recruiting top talent and screening applicants to identify qualified pools of candidates for each

school. From that group of initial recruits, the school leaders can select employees that best fit the school needs and culture.

Facilities Management Strategy - Securing long-term affordable facilities is a fundamental challenge for all charter schools and FOBCSE is no exception. Jointly the FOBCSE board and management have gained a significant amount of charter school real estate experience through a bond issuance for the flagship school purchase, through negotiating, renovating, and securing facility options for the Stamford school, and the second Bronx school opening in the fall 2016. The board and management have been successful creating task force teams to meet the challenges of a tight and cost prohibitive real estate market.

As a public charter school, FOBCSE is advocating for the same treatment as traditional public schools: a facility provided by the district, with occupancy costs (lease and/or mortgage) and ongoing maintenance of the building provided by the district. From a fiscal sustainability and slow growth standpoint, our fresh start schools average 40 square feet per pupil. To be conservative and build in some contingency dollars for a volatile facility market the financial model has used a \$50 per pupil allocation. Based on the New York market, and challenges in finding one campus that will house 810 students, the strategy is to identify two sites to accommodate elementary school and middle school within close proximity.

As part of the strategic planning process FOBCSE engaged Jones, Lang, & LaSalle (JLL) in June 2015 to perform a real estate study on five New York boroughs. The objective was to leverage the JLL industry leading real estate research to make more informed real estate decisions that will shape the long-term strategy. Additionally the research was used as the baseline for financial model facility cost assumptions.

Facility negotiation, acquisition, development and management has been the primary responsibility of the Board of Trustees and CEO to date. With SCSE's opening in the fall of 2015, and BCSE 2 slated to open this fall, the CEO has begun to decentralize facility support to the operations personnel at the CMO, as well as continue to receive board support with facilities acquisition and planning. Future facilities decisions will largely be driven by the Greenlighting factors we consider critical to creating a successful replication of a school: A fiscally tolerable facility cost quantified between 15% and 18% of total expenditures; An economically favorable authorizer relationship inside and outside the Bronx; A high need student demographic area with an interest and need in the FOBCSE school model; and, Proximity to the cluster of schools supporting an "Owning the Bronx" strategy.

Governance - The FOBCSE Board of Trustees already has 501(c)3 tax-exempt status, and is executing its management contracts with its schools as of Summer 2016. A CMO Board and the Stamford Board were created over the 2014-15 school year. The BSCE Board will be a "super board," allowed to operate several schools (BCSE 1-5) under New York State law. With all of this transition, key leadership has remained on the boards for stability purposes. Membership is extremely skilled and strongly seasoned.

Over the next two years, the FOBCSE's CMO Board will ensure that it has at least 11 members and will seek to fill a diversified skill set with a slate similar to: Commercial/Real Estate Law; HR contracts Law; 2 Finance; Two K-12 Education (esp. high school entrance expectations); Real Estate; Multi-unit management — scaling/replication; PR/marketing; Fundraising; and Community; National school reform. Over the next year, all Boards will also be participating in intensive board development workshops, retreats, and online programs to maintain effective oversight while building capacity and efficiency in governance. They will

focus particularly on governing multiple schools, streamlining our processes, and maximizing our potential. Through their effective oversight, the Board members will ethically and responsibly safeguard the schools' fidelity to its mission, vision, charter, and high quality model.

### (3) Financial and Operating Model

The Friends of Bronx Charter School for Excellence has developed a comprehensive financial model for the organization's growth and expansion plan, included as Appendix G: Supplemental Organizational Budgets and Financial Information. This financial model shows that the network will reach a point of sustainability in year 7 of the growth plan, with six schools serving approximately 2934 students in grades K-8. At the school level, sustainability will be reached in Year 4, with full consolidated schools' results showing revenues in excess of expenditures for all years presented.

Although FOBCSE is a newly developed network, the Board of Trustees, network leaders, and financial consultants are confident that the financial model provides an accurate picture of the organization's fiscal health. In developing the financial model, the school leaders made key assumptions for both revenue and expenses, including conservative projections for New York and Connecticut general and special education per pupil funding, Title I and II grants, and IDEA funding with no assumed increase in rates. Fundraising and other philanthropic income is attainable given the organization's history. On the expense side, cost of living adjustments have been made for salaries and other expenditures and adequate staffing has been included to ensure that all replication schools can attain the same academic results as the successful flagship school. Facility cost assumptions are well researched and reasonable.

Under the financial model, the central office of FOBCSE will provide continual fiscal oversight and support for all network schools by ensuring that each school's budgets are aligned

to the school's programming and specific needs, projecting revenues and expenses, and managing cash flow. The Board of Trustees will review financial documents at both the network and school level at monthly full Board and Committee meetings.

To ensure that each proposed new or expanding charter school receives its commensurate share of Federal education funds that are allocated by formula each year, the central office will maintain strict procedures for recording anticipated and received federal funding and tracking specific expenditures tagged to the federal funds. The organization will closely monitor all federal grant allocations for each school separately and align school specific budget expenses to the funding source. All procedures will be documented in the network's fiscal policies and procedures manual. Should FOBCSE be the recipient of a USDOE CMO replication grant, these same policies and procedures will be utilized to ensure that spending per school is aligned to the proposed grant budget.

FOBCSE is in the process of securing several multi-year grants to support our growth plan and network expansion. In order to successfully launch our growth model, we have established a fundraising target of \$13.23 million over the next five years. The Charter School Growth Fund Board has already approved a multi-million contribution over the next 5 years. We have also received philanthropic support from organizations such as the Peter and Lucia Buck Foundation, the Louis Calder Foundation, the Flom Family Foundation, the Shumway Foundation, and the Big Wood Foundation. We will continue to seek support for each start-up through planning and implementation grants for each school such as state CSP funds, which we deliberately and carefully separate from federal funding of our CMO. Additionally, FOBCSE will be hosting a number of fundraising galas to raise awareness, interest, and contributions. Moreover, we currently have several proposals in progress for multi-year grants with major

foundations. With the CSGF contributions and other anticipated funding taken into account, our fundraising goals narrow significantly to approximately \$7.8 million over the next 5 years, or approximately \$1.56 million/year. We believe this is absolutely achievable and feasible with a combination of public, foundation, and corporate grants, as well as individual contributions. We are currently working with a consultant to help us develop relationships with new funders and those connections have already begun. Within the next few months, we will identify a full-time Director of Development, who will assume this role on a full-time basis on behalf of our network.

The Charter School Business Management Inc. (CSBM) currently provides support to FOBCSE in the areas of finance and accounting, which aside from maintaining each school's accounting, includes board reporting, audit and budgeting support. In addition, CSBM helps manage the relationship between the school and payroll processing company. As our CMO grows to capacity, we will be transitioning to an internal accounting and finance team, which would allow us to continue to build internal capacity and have real-time access to financial information. This quick and easy access would allow the leadership team to make informed decisions in a timely fashion. Additionally, combined leverage and intangible cultural benefits of a full network leadership team, propelling all the aspects critical to successful network growth, (finance, operations, academic and executive leadership), cannot be understated

#### (4) Plan for Closing Schools

FOBCSE takes a proactive approach to ensure the success of each replication. FOBCSE schools embrace accountability measures to ensure that our schools provide the high-quality educational programs we aim to deliver. Every school has annual and comprehensive programmatic audits to evaluate the academic, operational, and financial health of the schools.

Throughout the school year, our schools collect and analyze baseline and incremental data points to measure growth towards achieving program goals. FOBCSE actively monitors and remains vigilant of each school's progress towards meeting benchmarks throughout the school year. Any gaps or anomalies are immediately identified, documented, and a plan of action ensues. For example, through our ongoing collection and analysis of student performance data, we may identify that a class is not making adequate academic progress. This will signal the instructional leadership team at the CMO level to work in conjunction with the school's leadership to identify the cause and to ameliorate it. Our instructional coaches will observe the classrooms, and may provide direct coaching, support in lesson planning, or targeted professional development. As the school year progresses, our instructional support team will continue to work with the faculty to ensure that corrective actions are effective. This process is not deemed punitive, but rather supportive and fully transparent in nature.

In the event that any of our schools do not meet our high standards of quality despite multiple and intensive intervention plans, the school's Board and the CMO may conclude that the only course of action as a last resort is dissolution. Naturally as a CMO, this will cause intense reflection and evaluation of our practices. However, as the steward of the charter, it is ultimately the decision of the education corporation. FOBCSE has established a Dissolution Plan as a guideline, which in the unlikely event of dissolution, the specific details of the plan would be developed in full coordination with the school and the authorizer to ensure the smooth transfer of all the school's obligations.

#### (5) Project Leader and Key Executive Personnel

The organization consists of a strong management team and senior-level educators who, combined, have over 65 years in the field of education. Chief Executive Officer, Dr. Charlene

Reid has been the lead administrator of the organization since 2007. Under her leadership, BCSE transformed into a high-quality, high-performing public school with structures and instructional practices of a team of well qualified educators.

*Dr. Charlene Reid* – Project Leader and CEO of FOBCSE. Dr. Reid is entering her 19<sup>th</sup> year as an educator. She began her career as a teacher leader in South Los Angeles after earning a BA in Political Science and an Ed.M. in Elementary Education from the University of California, Los Angeles (UCLA). Mrs. Reid also earned an M.Ed. in Educational Leadership from Columbia University, Teachers College before serving as an assistant principal in the Bronx and Harlem. In 2007, Mrs. Reid became the Principal and Head of School at BCSE where she spearheaded the turnaround of a school on the brink of closure. BCSE is now recognized as the highest performing K-8 non-magnet school in the State of New York and in 2012 was distinguished a U.S. Department of Education *National Blue Ribbon School*. Mrs. Reid was elected a Cahn Fellow, for outstanding New York City principals at Columbia University, Teachers College in 2011 and is a graduate of the University of Pennsylvania’s Graduate School of Education, earning a Doctorate in Education, Ed.D. in 2016.

*Tanya Ghans* – Director of Teaching and Learning. Ms. Ghans has 18 years of professional experience in the education field as a teacher and teacher leader. After receiving her Bachelor of Arts from Rutgers College, she was accepted into the Teach For America program. Later she earned her Master’s in Education from Teachers College at Columbia University. Ms. Ghans has taught students in kindergarten through eighth grade and achieved some of the highest ELA scores in New York State. She has also served as a Grade Leader, Literacy Coach, and Academic Dean. In her role as Academic Dean, she has managed to help the Bronx Charter School for Excellence remain a top performing school in the city and state of New York. Currently, she is

the Director of Teaching and Learning for the network where she oversees the academic rigor and instructional practices across all schools.

*Jacques Michel* – Senior Director of Operations. As the Senior Director of Operations at Bronx Charter School for Excellence, Jacques oversees operations, human resources, facilities, technology and compliance. He is responsible for instituting internal processes to streamline operational performance, project management, risk assessment and internal legal review.

Prior to joining Bronx Charter School for Excellence, Jacques was a Compliance Officer with the New York City Department of Education, where he also served as a Senior Program Manager in the Office of School and Youth Development and Director of Students in Temporary Housing. He has been a trial attorney in both public and private practice. Jacques earned his bachelor's degree from Colgate University and his law degree from Albany Law School of Union University.

*Monica Rios* – Regional Director of Operations. Monica Rios began working at BCSE as an Office Assistant in November 2006. Ms. Rios was then promoted to Office Coordinator, Office Manager, Operations Manager, and currently serves as the Regional Director of Operations. Ms. Rios' primary responsibilities include managing the school-based office managers, lottery and admissions process, compliance reporting, student transportation, food services, school-based purchasing, and processing free and reduced lunch applications. In addition, Ms. Rios assists in Human Resources and administration of Employee Benefits. Ms. Rios is a graduate of the State University of New York College at Oswego and has a Bachelor's Degree in Business Administration.

*Kathleen Elie* – Director/Finance Consultant. As a Director at CSBM, Ms. Elie manages a team of nine consultants and assists the Vice President and CFO with special projects and strategic

planning. Ms. Elie works with several clients across New York City and Westchester, managing their finance departments, conducting annual audits, and professionally developing their financial and operational staff. Prior to joining CSBM, Ms. Elie previously worked as the founding Director of Finance for Bronx Community Charter School. Additionally, she was an Assistant Director of Finance for Prep for Prep and worked in various finance roles for Read Works and The Learning Project.

**(e) Quality of the Evaluation Plan**

Project Evaluation

The Friends of The Bronx Charter School for Excellence, Inc. will ensure that all schools in its portfolio replicate the academic and cultural components of its flagship school, the Bronx Charter School for Excellence. This requires a thorough evaluation plan of replicating and expanding procedures including performance and academic benchmarks for students, as well as growth objectives for staff. The evaluation plan includes both internal and external evaluations to address the objectives and benchmarks. Table 1.1 lists the measurable objectives inherent in the larger CMO goals.

Table 1.1 –Evaluation Components

<b>Evaluation Component</b>	<b>Measurable Objectives</b>	<b>Activity/Action Items</b>	<b>Data</b>
Academic Achievement	85% of students will be at or above grade in ELA and Math	Teaching of foundational skills, exposure to quality literature and text-based comprehension	1. Unit Benchmarks 2. Developmental Reading Assessment (DRA) 3. Iowa Test of Basic Skills 4. Measure of Academic Progress Assessment 5. State Standardized Tests
Academic Achievement	85% of students will show one year’s growth (GLE) on the Iowa Test of Basic Skills.	Every Spring (May), the ITBS, a norm-referenced exam, will be administered	1. Iowa Test of Basic Skills

Teacher Development	100% of network staff will complete 200 professional growth hours	Professional growth hours submitted by teachers will be tallied to determine compliance.	Frequency data - percentage of goals met during the course of the school year.
Teacher Development	100% of staff will meet professional growth plan goals	Team Planning, Student data, professional development, coursework	Danielson Teacher Evaluation/ Formal and Informal Teacher Evaluations

### *Data Collected*

Each measurable objective and network-wide goal requires qualitative and quantitative data collections for program evaluation and overall decision-making. The quantitative data will be collected from the Director of Operations, Director of Human Resources, school administrators, and staff. Academic benchmarks and achievement goals will be determined by data collected from qualitative and quantitative data collection methods.

*Quantitative:* 1) Student achievement data – DRA, ITBS, MAP, State Standardized test; 2)

Student and Staff attendance data; 3) Surveys staff, administrators, parents, students

*Qualitative:* 1) Interviews of staff, students, parents; 2) Interview/discussions with administration; 3) Classroom observations – evaluations

### **Organizational Goal: Teacher Development and Quality**

Teacher development and quality are crucial to student achievement. Internal teacher evaluations are built into professional development practices. To this end, teachers have both formal and informal evaluations all for the purpose of development.

### *Teacher Evaluation and Observations*

As part of ongoing teacher growth plans and collaboration, teachers will be evaluated by administrators who use a formal evaluation program (Charlotte Danielson Framework). These teacher observations serve as reflective instruments for both teacher and administrators. The formal observations are completed three times per year. Informal evaluations are done weekly,

maintained with an excel spreadsheet, and housed in a database managed by employees in the central office. Data collected will also be maintained in teachers' professional growth folders and housed with appropriate administrators.

Teachers are supported in their growth based on the observations and evaluations. Administrators at each school site, under the management of FOBCSE will employ the following practices to support and build teacher capacity: Weekly/Bi-weekly leadership coaching; Walkthrough Analysis and Feedback; Thought Partnering (Curriculum, policy and practice); Leadership team meetings/training audits; Real time feedback (video analysis, Bluetooth assistance); Unit and lesson planning/Quarterly syllabus; and, Model lesson/Co-teaching

*Teacher Development and Growth Assessment*

All teachers hired to work in network schools will have an individual professional growth plan. The plan requires teacher and their supervising administrators to set goals and develop strategies to reach them. Teachers also commit to completing 200 hours of development annually. These hours manifest themselves as leadership activities, coaching activities, leading afterschool programs and activities, designing curriculum, and working with students and/or parents outside of the normal teaching duties. These hours help to build the culture of the school, but also allow teachers to contribute to growing specifically in their own areas of interest.

### **Organizational Goal: Rigorous and Meaningful Academic Program**

As a nationally recognized Blue Ribbon School, our goal is to continue to demonstrate the effectiveness of rigorous and meaningful curriculum and activities that develop the whole child. Curriculum, projects, and instructional practices are designed to push scholars to their highest potential and prepare them to be critical thinkers informed about the world, and able to offer solutions to problems.

## *Curriculum*

All course curricula are aligned with Common Core Standards. The literacy and math curricula are taught in 7-10 day cycles. Within this cycle, students are exposed to direct teaching, guided instruction, small group practice, and independent practice. New materials are presented in various forms through direct and guided instruction. Informal evaluation of student understanding is ongoing through teacher probing and inquiry. These cycles begin in September of every year. The first week is set aside for establishing baseline DRA levels. But literacy teaching and learning data begins with first cycle ending in the middle of the 3<sup>rd</sup> week of school – tentatively September. These data are reviewed by grade-level teacher teams.

The objective of these cycles is to provide feedback for teachers and data to guide the rigor of instruction. It also details areas where coverage may have not been sufficient. Re-teaching and reformulation of teaching methods needs become evident. The evaluation instruments are in-house assessments, text-based assessments, and practice standardized assessments such as Measures of Academic Progress (MAP) assessments. Collected data will be kept by grade teachers, but shared with appropriate administrators who manage school-wide data. These data will also be evaluated in the quarterly audits conducted by the CMO.

### **Organizational Goal: Student Academic Achievement and Character Development**

Student benchmarks and assessments are built into curriculum and instructional design of each subject offered. The external school-wide evaluations are conducted by a team of senior educators from FOBCSE. They will conduct rigorous evaluations of the effectiveness and fidelity of those assessment measures. The external evaluations will occur on a quarterly basis in the *quarterly audits*. All audit findings will be reported to the Board of Trustees and shared with administrators and staff.

**Goal: Students will become proficient readers and writers of the English language.**

- Each year, 75 percent of all tested students who are enrolled in at least their second year will perform at proficiency on the New York State English language arts exam for grades 3-8.
- Each year, the school's aggregate Performance Level Index (PLI) on the State English language arts exam will meet that year's Annual Measurable Objective (AMO) set forth in the state's NCLB accountability system.

**Goal: Students will become proficient in the understanding and application of mathematical skills and concepts.**

- Each year, 75 percent of all tested students who are enrolled in at least their second year will perform at proficiency on the New York State mathematics exam for grades 3-8.
- Each year, the school's aggregate Performance Level Index (PLI) on the state mathematics exam will meet that year's Annual Measurable Objective (AMO) set forth in the state's NCLB accountability system.

**Goal: Students will demonstrate proficiency relevant to science achievement and use technology, scientific concepts, principles and theories to conduct and analyze investigations.**

- Each year, 75 percent of all tested students who are enrolled in at least their second year will perform on the New York State science exam.

**Goal: Each network school will maintain a high student attendance average.**

- Each year, the school will have a daily student attendance rate of at least 95 percent.

**Organizational Goal: All network schools will adhere to all legal mandates and compliance requirements and will maintain fiscal stability**

Program audits will take place quarterly as a means of maintaining network performance and organizational structure. As the managing CMO, The Friends of The Bronx Charter School for Excellence, Inc. includes quarterly school audits specifically to determine academic rigor, ensure a welcoming and safe school culture, and maintain organizational and financial stability across schools in its portfolio. The audits will be essential for ensuring high standards and keeping with the goals of each school’s charter. Because these audits allow us to access all possible data for teachers and students, and these data are manageable given the school size, it is possible to conduct statistical designs for the population. The table below details the components of the audits and the rationale for the selected data collection and analysis plan.

Table CMO – External Evaluation Components

<b>Evaluation Components</b>	<b>Data Source</b>	<b>Method of Analysis</b>	<b>Method Rationale</b>
Teacher Development Audit	<ul style="list-style-type: none"> <li>• PD attendance records</li> <li>• Professional Growth</li> </ul>	<ul style="list-style-type: none"> <li>• Review of descriptive data</li> <li>• Comparative analysis</li> </ul>	<p>Descriptive data provides for an easy exploration of the impact of PD on practice</p> <p>Teachers will self-report whether or not their goals were met and factors that may have contributed to goal outcomes</p>
School-wide Academic Achievement Audit	<ul style="list-style-type: none"> <li>• ITBS Data</li> <li>• DRA data</li> <li>• Student Grades</li> <li>• Student attendance data</li> <li>• Teacher attendance data</li> <li>• Parent school surveys</li> </ul>	<ul style="list-style-type: none"> <li>• Paired <i>t</i>-test</li> <li>• Multiple Regression</li> <li>• Descriptive data</li> </ul>	<p>The paired <i>t</i>-test will annual growth</p> <p>Multiple regression will parse out which variable impact achievement</p> <p>The parent surveys will relay to the CMO and school leaders parents’ levels of satisfaction</p>
Talent Auditing	<ul style="list-style-type: none"> <li>• Teacher Retention Data</li> <li>• Teacher attendance data</li> <li>• Student performance data</li> <li>• Literacy Group DRA data</li> <li>• Foundations</li> </ul>	<ul style="list-style-type: none"> <li>• Descriptive Data</li> <li>• HLM</li> <li>• Regression</li> </ul>	<p>HLM will help to parse out teacher effects in Math</p> <p>Regression analyses that include DRA Group and Foundations intervention group will help to parse out teacher effect in literacy and DRA scores</p>

	Intervention data		
Financial Soundness Audit	<ul style="list-style-type: none"> <li>Quarterly financial data</li> </ul>	Comparative Analysis	An examination of projected budget and actual budget will assist in determining fiscal soundness

*Academic Audit period 1 – August/September*

During audit period one, the CMO evaluates school opening, baseline data on attendance, and baseline student assessments. When possible, data will be compared to previous year’s data to assess changes in procedures, changes in staff, and changes in student performance. Student DRA data is also checked during this period to gauge whether summer learning loss has occurred.

*Academic Audit period 2 – November/December*

During audit period two, the CMO collects and reviews data on teacher evaluations that have occurred since the beginning of the academic year. Returning staff evaluations will be evaluated against prior evaluations to determine progress. Student and teacher attendance data will be reviewed and proposed interventions (such as meetings with parents and teachers) will be made to stave off absences. Teacher professional growth plans will be reviewed to determine progress made toward growth plan goals. During this period, student DRA data will be reviewed to determine school-wide progress towards academic benchmarks. Student progress report grades will also be evaluated.

*Audit period 3 – February/March*

During audit period three, The CMO reviews data on teacher evaluation that has occurred since the last period. Teacher and student attendance data are reviewed to determine how close both students and teachers are to maintaining school-wide attendance goals of 96-98%. Teacher professional growth plans are also reviewed during this period to determine whether progress is

being made toward personal and professional goals. Student progress report grades and DRA data will be compared to prior period to determine growth. Recommendations will be made based on overall evaluation.

#### *Academic Audit Period 4 – June/July*

During audit period four, the CMO compares annual performance goals with the actual performance data. All teacher growth plans and evaluations will be reviewed alongside administrators' recommendations for new contracts or termination letters. This period will also require the administrative team to develop a plan and set measureable school-wide goals for the upcoming academic year with the senior educators at the CMO.

#### **Financial Audits**

**Goal:** The Friends of The Bronx Charter School for Excellence will make responsible financial decisions and demonstrate sound fiscal practices and management.

**Budgeting:** Each year, the school will operate on a balanced budget meaning actual revenues will equal or exceed actual expenses.

**Financial Condition:** Beginning with the school's first operating year, at the end of each fiscal year, unrestricted net assets will be equal to or exceed two percent of the school's operating budget for the upcoming year.

**Internal Controls and Compliance:** Each year the school will take corrective action, if needed, in a timely manner to address any internal control or compliance deficiencies identified by its external auditor, SED, or the Institute.

The CMO will ensure the financial soundness of each school in its portfolio, with the following procedures and reports:

1. Bi-monthly financial reports to the board of directors

2. Quarterly financial reports to the charter authorizer
3. Annual audits conducted by an independent auditing firm
4. Annual reporting to the charter school authorizer including finalized budgets and audited financial statement and results
5. Ongoing observation and discussion between the school's fiscal department and head of school

## **VI. APPLICATION REQUIREMENTS**

- (a) Please see Selection Criteria, Section IV, Subsections (c) and (e)
- (b) Please see Selection Criteria, Section IV, Subsections (a) and (d)
- (c) Please see Selection Criteria, Section IV, Subsection (d); and Budget Narrative
- (d) Please see Competitive Preference Priority 2; Selection Criteria, Section IV, Subsections (b) and (d)
- (e) Please see Selection Criteria, Section IV, Subsection (d)
- (f) Please see Selection Criteria, Section IV, Subsection (d)
- (g) Please see Competitive Preference Priority 2; Selection Criteria, Section IV, Subsections (b) and (d)
- (h) N/A
- (i) Please see Budget and Budget Narrative
- (j) Please see Competitive Preference Priority 2; Selection Criteria, Section IV, Subsection (b)
- (k) Please see Selection Criteria, Section IV, Subsection (b)
- (l) N/A
- (m) Please see Appendix E, F, and H
- (n) Please see
  1. Appendix F
  2. Appendix H
  3. N/A
- (o) N/A