

Proposed Libertas Academy Charter School

Questions derived from review panel and documentation review

In attendance:

Anthony Surette, proposed board chair

Jose Lopez-Figueroa, proposed board vice chair

William MacDonald, proposed board member

Rosemarie Marks-Paige, proposed board treasurer (*via conference call*)

Ellen Moorhouse, proposed board member

Dora Robinson, proposed board member

Mary Walachy, proposed board member

Kwame Webster, proposed board member

Modesto Montero, lead founder and proposed head of school

Linda Brown, Chief Executive Officer, Building Excellent Schools

Stephanie Patton, Director of Leadership Development, Building Excellent Schools

Absent:

David Silva, proposed board member

1. [For Modest Montero] Please tell us about your experience as a BES fellow and how it supports your preparedness to become the proposed school's head of school.

- It's been quite an experience. I would highlight various different aspects. There's the portion in which we have an opportunity to study and learn from some of the highest performing schools in the country. So far we've visited over 20 different schools, some in Massachusetts, New York, Tennessee, with intent to visit additional schools. While we're visiting those schools, we also have an opportunity to work closely with school leadership, instructional leaders, ELL specialists, and really pick their brains on what is at the root of their success, and in turn it impacts and informs our proposal. So I would say that's the biggest aspect of the fellowship that I've found absolutely valuable. The second piece is direct coaching that we get every single day. It's everything from communication structures, to recruiting and supporting the development of my board, to my own development as a leader. And a third piece I would highlight more specifically is the instructional piece. At the end of the day, I am aware that I will be the instructional leader of the school, and that's a big part of my job, so we spend a great deal of time talking about that, sitting through various different sessions for my development, which also includes a focus on finance. At the end of the day, if my finances are not in line, then our school will not be successful.

2. [For Modesto Montero] If chartered, this school would be your first position as a school leader. How do you anticipate your role as head of school evolving over the five year charter term as the school community grows?

- Initially, I see the role as the instructional leader of this school. So my first step between now and August 1st, when I do my second residency at Excel, is to become extremely familiar with the Massachusetts frameworks. I have taught in the past, I have coached teachers, so I'm very familiar with that. I was also a Common Core coach. I feel very well versed in instruction but not necessarily very specific to Massachusetts, so that's a priority for me. So that would entail really unpacking the standards, understanding what our students should be able to do at each grade, not just in sixth grade, but in third, fourth, and fifth grade, since we predict that a significant number of our students are coming to our school with academic gaps. So I would say that's my biggest priority in year one, evolving into an instructional leader that has a really clear vision and bar of excellence for our students, and that I'm able to coach both my teachers and my instructional team to ensure that we're meeting the needs of every single student. As we grow in size, I understand that my role has to also grow, so not only am I focused on the day-to-day instructional piece but thinking about the strategic vision and mission of our school and constantly evolving to ensure that we deliver upon our vision and mission, which is to ensure that our students graduate from our program and then are able to enroll and succeed in the college of their choice.

3. [For Modesto Montero] What do you consider the greatest challenge to the school's success and how are you equipped to address it as the proposed head of school? And along with that, a follow-on question: What prior experience do you have in making difficult decisions, such as firing employees or dealing with parent complaints?

- I would name the biggest challenge that, as an instructional leader, I grapple with—and I think about all the time and I spend a lot of time thinking and talking to my coaches and my networks of educators—is how are we going to be able to remediate our students to ensure that they're able to tackle the demands of Common Core and beyond, and really college courses? Knowing full well that currently our future sixth graders are in fourth grade, and those fourth graders, about a third of them are performing proficient or higher in the math and ELA portions of the MCAS. That's a significant academic gap. We understand that. In addition, in the North End we know that over 75% of the population is Latino, very much like me, and therefore they're going to come in with significant language barriers. So we have not only an academic gap, but also a language barrier. That's a challenge for us. What that means for me is that we have to be proactive. We know we're going to come in with those challenges, so we're going to address them proactively. The first step is to ensure that we are clear on what those gaps are, so at the beginning of the school year, our students are going to receive various different diagnostics, such as the ANet formative assessment, the NWEA MAP formative assessment, and an assessment that we create based on my process of familiarizing myself with the Massachusetts standards - again, to identify what are the specific gaps that our students have - and then we will leverage our extended school day and extended school year to ensure that we're remediating our students while simultaneously teaching grade-level content. The second half of the question, which is challenges, two really big questions and I appreciate that, the second half, I think I will tap into two different experiences. I think the first one as a Manager of Teacher Leadership Development on staff, as a coach I actually on a daily level had to engage in very difficult conversations, and my first year we had to remove a teacher. And it was tough. This was an educator who worked really hard and believed that this was the right fit for her, but the results were not there. There were some significant professional gaps that existed, and at the end of the day I had to work diligently to ensure that we had the supports in place to help her grow as a classroom leader. She wasn't growing to the degree that she needed to, and I had to make the decision to recommend

that she was removed from the Corps, which is almost unheard of, at least in Teach for America of Memphis. That is a really, really hard thing to do, especially when you get a first-year teacher and you get to mentor that individual from day one, you get to see some progress, but at the end of the day you know that that individual is not doing right by students and not doing right by families. At the end of the day we have to do what's right for kids. It was probably one of the hardest decisions I had to make, but I don't regret it. I stand by it. If I had to do it again I would. I think that's one piece. I think the second piece I would highlight, that's easier maybe, because the military has a more clear structure. I'm a sergeant, I was in charge of a team, and there was a particular soldier who broke a couple of regulations when we were training and I had to reprimand that soldier. That soldier ended up getting demoted, which means you're making less money. You have a family, so when you're impacting someone's wellbeing and finances it's tough, but at the end of the day for me following the rules is so critical, and I understand the impact it would have on our team if I just did what I thought would make me feel good rather than the right thing. So I feel really comfortable making those tough choices. I've made them in the past, I know they're hard, but at the end of the day, as long as I'm doing it for the right reasons, I can commit and follow through.

4. This next question, I'll look for answers from the board first and then I imagine Modesto will be able to add some details and then Building Excellent Schools may be able to add some additional details as well. What role will Building Excellent Schools have prior to opening if the school is chartered in February? What are the expectations about the role that Building Excellent Schools will play in the launching and operation of the proposed school? What services are provided during the school year by Building Excellent Schools? So let's hear from the board first. What are your understandings about BES's role this year through the opening and into the first school year?

- Our relationship with BES, Modesto is a fellow with that program currently. Our relationship with them for the planning year through year one will be non-contractual. Moving forward, there is a line item in the budget for the contract to have BES as a support.
- I will add, from a governance prospective, we look forward to continuing to receive guidance, support, and advice transitioning from a founding board to a formal board of trustees, making sure that our policies that govern the charter school are fully aligned with the state mandate, DESE's mandate, ensuring that members of our board will receive the kind of governance development that will help us achieve the high academic standards and expectations we want for our students.
- And again, just to clarify, during the planning year we'll have a deep relationship with BES, as well as for the next two years minimally, in which we would then do a contract, which is allocated in the budget. Beyond the governance piece - and I know BES has already proven its skill in this area - is really the coaching of Modesto, really assisting in making sure that we get off the ground well, and that we sustain a really strong academic program and a governance structure, and really anything and everything we need to ensure that we hit the ground running.
- The relationship with BES will continue for the remainder of this year in the fellowship with Modesto, who is finishing up the fellowship. During the planning year Modesto as the leader would be assigned a leadership coach -that would be me (Stephanie Patton, founding head of school for Excel Academy Charter School - Chelsea) -so I provide direct support to Modesto in any area he needs to successfully launch his school. So whether that is around hiring structure, in posting roles, screening candidates, whether it is around developing staff professional development, those are all ways I will provide support directly to him as the proposed leader of the school. As Mary mentioned, during what we call year zero, which would be next year, the

planning year, Building Excellent Schools is committed to providing that support and then after that year we would be used as a vendor in a contract made for the first and second years of the school to continue that support with school business and continue direct coaching of the school leader. Having been in the founding of a charter school in Massachusetts, I understand the complexities and challenges that you face when you open a school, and we'll be able to add that expertise to support Modesto.

- The only piece that I should have mentioned: in the work ahead, the residencies that I will do as part of the fellowship...So my residency technically starts next week at Excel Academy Chelsea, which, I'm really excited. It's a four week residency in the winter and then again in the summer. So for this round, it's an opportunity for me to truly go a little deeper into the success of what we're seeing in some of the high performing charter schools, specifically for me at Excel, and then taking what I'm learning there to build out my action plan for the planning year, both instructionally and operationally, and getting ready the second residency, which would allow me the opportunity to focus even more on the professional development for our teachers, creating curriculum, creating assessments and other pieces. I'm really eager to become really familiar with that.

[Follow-up]: You mentioned the second residency would be at a different Excel? So is it Excel Chelsea for the first four weeks and then a different campus?

- The August time is often spent collectively with a lot of the Excel schools, so it would be a mix of those two campuses. All the professional development of the different campus staff takes place together.

5. [Board] How will you assess Mr. Montero's effectiveness as the proposed school leader?

- First of all, let me just say that this board is thrilled to know that we have someone the caliber of Modesto as the proposed school leader. We're equally thrilled that he's going through the Building Excellent School program because it is nationally renowned, and turning out some of the highest proven school leaders and therefore schools in the country and my hat goes off to Linda and her team for that. That said, we have developed a job description for Modesto. We have identified targets and various outcomes you can expect to see from him as the school leader, and that's everything from what he needs to do to get the school off the ground, the identification of strong staff, a plan around curriculum, developing the vendors that we need for assessments, the identification of the sites. There's a lot there, but we are committed to keeping an eye on that, watching that, doing an ongoing evaluation of his performance based on those agreed-upon benchmarks prior to the school's opening and operation. We'll have a committee that will conduct the evaluation, but then it will be brought to the whole board. One thing I think that's important to mention: that, while all of these things matter in terms of his performance and therefore our success for our students, probably at the top of the list in terms of making sure he's holding the mark and being successful is student performance. We've made a promise and we will be making a promise to the students that we'll have in this school and certainly to their families, and that promise is that we are going to make sure that they're academically successful. And if we are doing that, that is going to be a challenge. We believe we have everything in place for that to happen, but that's a criteria we will really hold very dear to our hearts in terms of our commitment to the school as a board and will be right up there in terms of our evaluation of Modesto and certainly the rest of the team.

6. [Board] How will you assess the quality of services provided by Building Excellent Schools and its impact on student learning?

- I think as a team we would look at a lot of the resources and information before us, so both the professional development that would continue on Modesto's side as a leader simultaneously alongside what they're offering us with regard to information and exchange of ideas and creativity, coupled with an overall picture of where we are in the beginning and what that projection looks like both in year zero, year one, and year two. So as a vendor, the relationship increases away from the fellowship, we'll be able to mark clear instances of creativity or sharing of ideas back and forth between the school or more along the lines of training, the fellowship, through consultation.
- I would imagine that as we have a process of assessing our governance structure and the efficiency and the performance of the board there would also be a way of gauging our involvement and the level of support and advice we're receiving from BES. So the evaluation is on both sides, our performance in benchmarking what basically they have offered in terms of advice and support.

7. [Board] Modesto is a proposed board member, a proposed trustee, and a proposed non-voting member of the board. Can you tell us about the rationale for his role on the board?

- We recognize a clear delineation between governance and management, but we also recognize that to have that rests solely on open communication. So while there are management pieces that will be delegated, while there are pieces that governance will uphold, we really feel strongly that for him to be at the same table, and subsequently on the same page, is really important. So having him with us, simultaneously involved in discussion of an overarching strategic plan, as well as referring back and providing pieces of what's going on in the day-to-day operations is really important to us as a data-driven metric. We'll be able to openly exchange information and communicate so that everything going on, both at the higher level of governance and the day-to-day operations, are all on the same page.

8. [Board] We'd like to get a sense of the experiences the board brings and things that will enable you to be effective in overseeing a charter public school. What qualifications do you have and what qualifications are you seeking for the board based on your current composition? Are there additional areas you've identified as areas where you'd be seeking additional strength?

- I think it's best evidenced by the people sitting around this table that we are really excited that we have a pretty diverse board, diverse certainly in terms of their personal experiences, professional experiences. Many of the individuals at this table live in the city of Springfield, have lived in the city of Springfield most if not their entire lives. Some work in the legal field, as is the case with Bill, and we have our financial expert, and we have one of our education experts, and we have fundraising expertise, and educational expertise, and so we may not have a perfect complement, but we believe we have a really great start. We also have an expert, someone working in higher ed. That said, we know we have some areas where we really want to beef up the board. In particular what comes to mind is we've talked about some more expertise in facilities and site management. A second area we know we'll be needing some help in is in our backroom operations piece. We have people here, we have someone who's going to serve as our treasurer, but we're identifying a backroom organization to help with that piece. And then we're going to really work to beef up our expertise in the education space and the academic arena, particularly as it relates to special education and ELL (English language learners). And while we have talked

with individuals and organizations who have that expertise, maybe in a contractual way, we want to have that on our board as well.

- I think we've also looked at marketing and communications, making sure that we have board representation that addresses all of the needs, who can provide oversight as well as advice.
- One thing I will also add: as part of the board, our extensive network. As you can see our board here is very diverse as far as potential backgrounds. So bringing out our extensive networks and leveraging those networks and resources for the success of Libertas Academy and the students and bringing other opportunities and programs to Libertas through leveraging our professional personal networks that we bring to the table.

9. [Board] What role did the proposed board have in the development and review of the final application, including the draft budget?

- I'll start with the budget piece first. Modesto during the approval process and getting the board on hand has been providing us with weekly updates. So we have seen portions of the budget all the way up to the application process and since that point in time when the budget was submitted we have since reviewed together as a whole. Everybody has been provided a copy of the budget to understand to the best of their abilities from a financial standpoint. But it has been made available and communicated throughout the process.
- On a broader level, he touched on weekly communications. We've had a weekly board update that's been sent via email. We have had one-on-one phone calls, dual meetings, we've come together as a whole and individually. I truly do not feel that any of us lack for a want of communication from this fabulous and driven man.

[Follow-up]: What sort of pressure-testing of the budget, what sort of conversations took place collectively prior to this submission in November? What types of feedback have been provided to Modesto in terms of what in fact was being proposed?

- Modesto has worked directly with Central Source. They're a company that helps do budgets for charter schools. So in the entire experience they have helped along the way building what the budget is, and then Modesto has educated us on what's inside of it. And then as far as talking about the specificities, we focus as a board on talking about revenues, where the sources were coming from, as well as expenditures related to staffing and facility.
- We've met and discussed certain things that we anticipate, such as our special needs population, ELL population, and then anticipating that what we're proposing, if that were to change and what it would look like, so we're definitely playing out certain scenarios and making sure that we have action plans on A, B, and C and making sure that what we're proposing is realistic and we will accomplish in the event that we get hit with a speed bump, and playing out that scenario to make sure that even if this happens, we are well prepared with this back-up plan, so to speak. So definitely proposing challenges on that and making sure that we're well prepared to move forward.
- Did you say pressure testing? I really enjoy that and that's something that was helpful in this early development stage, was offering those A, B, and C. So if we came in with a game plan ready to go, I was like, 'Here's our plan A,' and she was like, 'But what happens if? And what happens when? Because this will happen.' Pressure testing is a great way to put it and that really resonated with me because we've had a great back and forth on those A, B, and C plans because there are speed bumps.

10. What resources did you use to assist in the development of the draft policies submitted with the final application?

- The biggest resource beyond Modesto and his skill and his knowledge was all the work and advice and policy examples that we received through BES and the fellowship and all that they have to offer. I have a very good friend whose name is John Davis and he has a few sayings, and the first one is, 'Why reinvent the wheel when you can steal shamelessly?' And this board has no qualms about stealing high quality products, programs, and services on behalf of the young people we'd like to serve.
- Also I'm aware that Teach for America as well as ESE's own manuals played a role in some of the information we gathered as part of resources for our initial proposal.
- I'm very impressed with ESE's opening operations handbook that basically is a bible for how to open a school. It pretty much hits on every possibility of things that could go wrong and links you to all the appropriate agencies that can help.

11. What resources did the group access to support the development of its understanding of the role and responsibilities of a charter school board of trustees?

- We participated in a full day-long training that was led by the Building Excellent Schools (BES) founder and CEO Linda Brown. In that training we went over the autonomies provided for charter schools in exchange for the accountability that the state asks in return. We will also be working with the director of board governments of BES, a person who has tremendous experience working with over three dozen schools nationwide, and that person will additionally help us abide by the questions and situations around governance that you need to govern Libertas.

12. What do you consider to be the role of board committees in ensuring the effectiveness of board oversight? How were the proposed committees determined? You've proposed finance, development, governance, and academic achievement.

- You did receive a copy of our bylaws as part of our charter application. All organizations require standing committees that provide leadership and oversight, policies, and practices in certain areas, and the ones we've identified are governance, which would be responsible for recruitment, new board members, orientation of board members, ensuring that the board is operating efficiently and effectively in supporting the charter. And then of course there's the finance committee, which under the guidance of the treasurer will be responsible for ensuring that we're being fiscally responsible and that we're providing oversight of our budgeting and spending - again, compliance. Compliance and making sure that we are providing oversight of the implementation of policies.

13. [Board] Please describe an example of a situation in which the board might set or revise a policy. How would the board gather feedback from the school community?

- I think with regards to our policies, in the beginning we'd outline some clear subsets of groups, so a student policy handbook or a teacher or a parent handbook. If we were to delineate a policy with regards to, say, parents and it's cutting off a communication or we found some complaints came forth that they weren't able to bring their issues to the school or to the management team, if there was something management could bring to the table where they realized there was an issue

on the ground, that would be something we could revise and address with feedback through our community, either through our students themselves or the parents. Should an issue arise, we would expect management, with that seat at the table, to communicate any feedback from us, from students, parents, or staff.

- I think I'll just add that we'll think very seriously before changing or revising a policy that's already been put into place, so we would certainly be discussing that, and depending on what the policy is, if we needed to go into an executive session, the sensitivity of that policy, what was wrong with it, even in year one or year two, even consult our consultants at BES as far as best practices and proper direction before coming to a decision. But certainly it would be discussed and looked into and taken very seriously to actually change or revise a policy we put into place.

14. Dora Robinson, this is a question for you. You have been involved in the establishment of other charter school options in Springfield (Founder of MLK). What have you learned about what it takes to be successful?

- I guess there's two things I've learned over the years. One is that it's important to have a good school leader that has a lot of instructional experience that really can provide a kind of leadership support, opportunities for development, I think is really critical. I've also learned that governance is a very important aspect. I mean, it's one thing to recruit individuals to be at the table and have that diversity and it's another thing to recruit individuals to your board that bring solid expertise and solid commitment to very high standards around academic performance. And then having a process to actually use data to drive your decision making. So on occasion people collect data, but there are times when that data is not actually used for improvement, whether it is individual student improvement or faculty/teacher improvement, using data effectively is extremely important. So I would say those are the three things I've observed over my ten plus years of watching charters and understanding the way charters have operated in Springfield. And some have fared extremely well, and as you know, some have also struggled, and it's around those three areas: student performance, governance, and leadership. That's my personal perspective.

15. We want to shift gears and talk about budget and finance before we move to the academic program and the targeted student population you intend to serve in the North End of Springfield. There are so many different ways that your revenue and expenditures may be different than you currently project. What's the thinking around financial sustainability, from both the board and school leadership's perspective, and how did you determine 90 students for the first year of operation? How does that number make sense financially and what would you do to adjust spending if in fact you need to?

- I'll start with the revenue piece of it and the budget piece of it. The budget draft is conservative based on information that we've worked with, our resources, to develop if there should be any variances from that. Our budget is always going to be mission-aligned based on secured funding and with thoughtful assumptions. If there's a variance between our budget and expectations, facility costs for example, we would attempt to adjust our resources in a non-critical role, meaning from a staffing standpoint we would focus on an admin role that could be...in the pre-planning year, in year one, we could try to do admin sharing, where a head of school, a director of operation, could step in as we move into year one to avoid some of those staffing costs. If facility costs were higher than expected, although we don't anticipate that because of our research and knowledge with the real estate agents in the communities we're working with, we would address those expenditures by looking at our cash flow, understanding what the budget has in regards to a

contingency fund as well as what other resources are available. So the budget in front of you is conservative. If any variances were identified we would address those in a timely manner.

- I would just add to the rationale behind 90 students. When we were developing this school and proposing this school, the tension for us was that we wanted to ensure that we're successful from day one while also simultaneously targeting as many students as possible and finding the happy middle ground, both from a financial standpoint but then also from an instructional piece. We know that a smaller school size is one of the ways in which our program is significantly different from other schools in Springfield, and we plan to leverage that small school size in the way in which we support students and build relationships with families. So the 90 number we landed on both pragmatically what is best for our school to ensure we're very successful from day one with our students, and the second is financially what makes the most sense for us so that we're able to run a successful program and meet all the needs of our students.

[Follow-up]: So what other adjustments might be made besides administrators? Because, again, that first year of operation, you are dealing with a relatively skeleton staff, and then as time goes on you're hiring more folks. Is there an understanding of other adjustments and flexibilities within the budget that would permit you to react to having to hire additional special education teachers, ESL (English as a Second Language) teachers? We have questions about the North End in terms of facilities as well. Any other additional thoughts you'd like to share?

- There are two things I can add to that piece. I think in terms of the staffing structure, we play around with various different contingency plans. So, for example, if we need to add an additional ESL teacher given the population size, currently we're proposing six core content teachers with the understanding that we have the flexibility of going down to five and hiring an additional teacher. So, thinking as much as possible, what I would recommend to the management side to the board, is figuring out how can we play around with the numbers and changing the roles and still deliver on our program in a reasonable manner that ensures the success of this school. In terms of facilities, in some degree something that keeps me up at night, mostly because I'm excited but also because I understand that that's something that will be a challenge and has been a challenge to other schools, and we've been proactive on our front. Just last week I went at a bit of a surge with Mike Ronin, who worked with the Charter School Support Services (proposed vendor for the school). We looked at some facilities in Springfield. We started to identify what are the options. Who is willing to work with us given the constraints of a small school in year one? And one of the most promising options is potentially co-locating with another small charter school that's currently looking for a permanent location, and obviously I will not disclose that given some of the work that's happening. But again, we haven't identified a facility, but we understand the urgency in needing to find the right space for us.

[Follow-up]: What's the likelihood of you locating in the North End, then? If you're proposing a temporary space co-locating with another school, and your target is the North End, how does that support your goal? Are you intending to temporarily not locate in the North End for a period of time, yet it's still your goal? What flexibility is there around locating in the North End or in close proximity to it?

- Because it's such a challenge, ideally we would want it—and I don't want to speak for the board and I welcome other members to join in—ideally we would love and want to be located in the North End, again, given our small school size. There might be a world in which we might have to in that first year be located close by. So, the location they're looking at, it's within a hop and a skip away from the North End, so it's right on the borderline. It's something that I would feel

comfortable proposing to the board as a potential location. But if I look at my map over here, out of the 23 facilities that we've been looking at, I would say—and I can give you a more specific number—ten of them or so are in the North End and the rest are within proximity, with a couple that are further off from where we want to locate.

[Follow-up]: Of those facilities in the North End, are there significant renovation and construction costs to converting those spaces to schools?

- I have not looked at every single one of them. We've looked at a few and we started that process. The one that's the most promising would require additional uptake. That's something that the landlord... Again, we have not had this conversation yet. We've begun the process but that's something we brought up as a concern and he was willing to include that as part of our needs agreement as well.
- One of the things, and maybe it's the case in other communities and the board doesn't have experience, but I will say that we have some really phenomenal real estate people who have been really committed to the whole charter movement and have been very helpful with many of our organizations, not that we have a huge number of charters, but we have a few and all of them have had at one point or another some facilities challenges, and some of them still do, but without charging we've had real estate agents serve as site developers. So the bad news is we don't know the answer to where we're going to be tomorrow, but there are some options and I think there's a lot of people in Springfield who are really dedicated to making sure this facility happens in the most efficient and effective way, with the bottom line being a commitment ultimately if not immediately to being in the North End. And including the North End community and some of the nonprofits in that community are just thrilled and Modesto's done a great job in connecting with them. I think there are a lot of opportunities but there's nothing solid.
- Just to build off of your concerns with the location itself. The "North End" is more of a colloquial use in the city of Springfield, it's not actually physically a neighborhood. It's comprised of Brightwood, Liberty Heights, and more just sort of commercial and medical space. While we recognize that it's a challenge, the opportunities that exist for old buildings in the city of Springfield or something out of use that could be captured with a rent structure that we feel good with a lease. We're comfortable with our options and confident in the plan of the building, especially working with community partners.

[Follow-up]: I want to pressure-test a little bit more on finance. I'm wondering what else the board discussed regarding the proposed enrollment in the first year. Tell us more about your confidence of ensuring a high quality start given that you do not have access to the same kind of starting resources, such as the federal Charter School Program grant, and you don't seem to anticipate significant private fundraising, which is conservative but perhaps raises concerns about the level of wiggle room you have.

- I'll talk a little bit about the fundraising. First, we are well aware, by the way, that we don't have the startup funding, which is certainly not a good piece of news. But, we have already proactively, I think you probably saw it in the proposal, you see a commitment to try and keep those startup resources should we not find them someplace else. The board recognizes that we may need to do some other additional fundraising. I will say, and I realize it's hypothetical, Congress's budget to the president is really very positive with regard to improving resources for charters, and rest assured, we will be all over that should the time come or we have that opportunity. Within the budget itself, I'll speak to Modesto's salary which you also raised. Modesto has agreed to take a cut in pay in order to allow his school to get off the ground and to

make these numbers work. We agree that he's being paid lower than market. If we have any ability to change that quickly, we would, but our first and foremost priority is to make sure we have what we need in the classrooms for all of our students. And again, as you know way better than all of us, as we increase students, we increase revenue, and as we increase revenue we can spread costs and we would quickly try to get back up there. But the commitment, and we'll have to thank Modesto, is that he's made the sacrifice that we need, to make sure these things are in place for the school and we will as quickly as possible as a board adjust his salary, although that's not our first priority, frankly. Our first priority is that we have what we need in the classrooms and in the school to meet the needs of the students that we receive.

- I'll also just add that when building the budget, we ensure that we build in secure funds, and that's the other piece that I think created a bit of a challenge for us and made sure that this is what the board is committed to raising and we can guarantee that this is what we secured. So I think the budget that's in front of you is to some degree the result of that. And I won't speak for the board necessarily around our fundraising goals, but again, this is more based on just secure funding.

16. Is the 30 student class size also an artifact of the financial constraints or is there a philosophical piece?

- For me, in thinking and supporting the board in this process, we wanted to ensure that we had four classrooms max, three would be ideal, because of what that would mean for each grade. So we have three teams, and two teachers in each of those classrooms that are owning that advisory, and that was a critical component for me. So that meant that with six staff members, that we're looking at three versus the ideal of four, which would then bring our classroom size to 30. And the intent here is that we are able then to double up on teachers as much as possible so we're meeting the needs of our students that have a language barrier or might need one-on-one support or small group support during a lesson, then we have that flexibility if we can push in a couple more teachers there. Again, having four classrooms, we could make that work but we would not be able to then provide a strong support that I want to ensure happens every single day.

17. What is your commitment with respect to backfill? Can you explain your understanding of what's required and if it changes over time?

- We are first certain that we want to be accessible to as many students as possible and we're a public school and we take that extremely seriously. We have decided to end our backfill at tenth grade and that's beyond the state's requirement of ninth grade, and really honestly that is the tension that the board's been struggling with because we do want that access, we do want that equity, but in order to fulfill on the promise of ensuring that all of our students are graduating in 12th grade and going to the college of their choice to succeed, we would need two years with our students. And so even though it's a very, very tough choice given our mission...

[Follow-up]: Is that a decision you came to post submission of the application?

- We've had that conversation recently. I think we thought it was clear in the proposals, though, but we just didn't make it clear in the...
- I think the other piece in the conversation we added quite recently is that maybe that's where the vaguest language comes in is the fact that we're also open...and again, I don't want to speak to the board, but as management I'd recommend when the time comes we're able to revisit that

policy and think about are there resources and opportunities for us to change that? And I think that's where some of the tension manifested in the proposal was coming out of that conversation.

[Follow-up]: But you're on the record as backfilling through the first charter term through grade ten.

- Yes.

18. With this question, I'd like to hear from the board first, and then Modesto or Building Excellent Schools. With Building Excellent Schools as a partner and a BES fellow as the proposed school leader, what components of the BES model are non-negotiable and what aspects are open to organic interpretation and evolution by the faculty and board of trustees?

- I think I speak for myself on this side of the board at the moment, I understand there will be clear room for identity and in fact one of our really strong core components is character development of our individual students and subsequently ourselves as an entity. Libertas is almost prideful of the fact that we can develop a school community based around our mission. With regards to the BES, I feel like it's not so much a model based off BES itself as an entity, but just a proven track record of success, so their culture of creativity and communication that has allowed such schools to develop and flourish and sort of created a platform by which we can launch. So not necessarily an all-encompassing self-identity, but allowing Libertas to develop itself and its mission alongside its core goals tied to success. So definitely rooted in, but not to do with our own identity.
- As a board we agree wholeheartedly with that. Reinforcing what Mary said about not reinventing the wheel, clearly BES has a very proven, successful record, so using them as our consultants and our expertise in an attempt not to reinvent the wheel, but using them as a model, learning from their success, but certainly growing as Libertas Academy has as a school together.
- And I think we're very clear that BES is a consultant, offers consultation, but it is the board and governance and the school leader that actually will make final decisions around the school culture, certainly policies, finances, because we're being held responsible by DESE as a governing body. BES is not going to be held responsible for the outcomes. However, they are integral in helping us achieve the kind of outcomes we would like for our children.
- I completely agree. BES is the proven provider and is here as the support. It doesn't hold the charter if the charter is granted. Our philosophy is that we want excellent schools and if the school is having results, we will advise and support in any way we can to make sure there are excellent results for the children in Massachusetts at Libertas. But there is not one specific mold we expect Modesto to fit in to. There's some pretty basic pieces, but we want the school to flourish and to have other schools go to Springfield and learn from Libertas the same way Modesto has come to 30-plus other schools to learn from and build his school around.
- And if I may, one last caveat. I feel every individual around this table has their own individual flavor, and especially Springfield itself as a whole. I'm born and raised in Springfield and I can't wait for the culture to develop. I think it's an extremely unique urban area that will be complemented by what we're doing here.
- For me, as I've engaged in this process and had an opportunity to learn from some of the highest performing schools, I always look through the lens of like, 'What is the magic bullet at this school? What is the thing we can take from this school and bring to the North End, to our community?' So to sort of highlight what everyone's saying, we're not going to go in here and try

to duplicate exactly a particular school, but try to learn from various different elements that are true to who we're trying to be and what we know we need to be for the families in the North End. So I think there are clear components that we're already thinking are going to be so critical: rigorous academics, data-driven instruction, ensuring that we're not wasting any time because we know there our students are coming in with significant gaps and we need to remediate them, so that urgency is there. In terms of that specific strategy again, it's based on what is actually working based on our experience and what makes sense to the context of our community that we serve.

19. How is the development of character traits to support student long term success treated with the same level of rigor as academics?

- I would say even in our proposal, the right push in the prospectus was around that. It excited me and that was something we wanted to spend a significant amount of time thinking about as thoughtfully as academics and we did, both in creating a long-term plan in six through twelve - so, outlining what is the theme for every year? What is it we hope to achieve with every single student? And what are the experiences that need to be in place every year so that our students are reaching that level? At the end of the day if the students leave our school with the academic foundation but not necessarily with the people skills or the character development to succeed within college, coming from the background it will be coming from, a background that I identify with, there are significant other obstacles they need to overcome outside academics and we want to support them as much as possible so we can truly deliver upon our promise. So we've been very thoughtful both on the long-term plan and the specifics of what would every single day look like at our school. Learning from other schools that are doing it on a very high level, and giving it our flavor, our own twist, based on what we want to be true. For example, our focus on selfless service: I think it's to some degree a core value that's very unique to Libertas Academy in how we incorporate it throughout the scope of the character development in six through twelve, which includes community service in middle school as a grade and then community service hours in high school as a graduation requirement. So that's one thing I would highlight, but, again, we're very committed to that. We put a plan in place and a plan that we're very excited to go back in and develop just as thoughtfully and as clearly as we're also developing our academic program.

20. How will character development be assessed?

- There are lots of different moving pieces. I highlighted one, which is tracking our students completing their community service hours. Because we create our scope and sequence in six through twelve and we have a cycle that includes what happens every single year, at the monthly level, at the weekly level, and daily, assessment would then reflect those pieces. So for example, at the daily level, every single day our students are receiving feedback from our teachers in the forms of merits and demerits. So merits and demerits are a clear way for teachers to coach our students to our expectations not only around behavioral expectations, but also character traits. Let's state there's a student who is demonstrating our core value of respect during a lesson, that means our student is highly engaged and supporting their peers if they're struggling or falling behind, that teacher might reward that student a merit and name the rationale. So, 'Thank you so much for being really, respectful throughout the lesson and remaining engaged and supporting your friends. That's a merit.' Throughout the course of the day, those merits are being collected on an online platform and at the end of the week, students will receive a weekly report that outlines and records the amount of merits and demerits they've collected. As a staff we are committed to constantly revisiting at a bare minimum three times a year our students' data to pick up trends. Like, to what degree are students actually living out our character values based on the

merits and demerits and other different data points such as attendance and other pieces that are happening in the classroom, and we will make adjustments to our curriculum as it relates to character development as needed to move the needle for our students.

[Follow-up]: Can you tell us more about the character development curriculum?

- In terms of what would happen every single day? So, a big bulk of the learning would happen during advisory. So, teachers are tasked in middle school - and it's a little bit different in high school—teachers are tasked in middle school with explicitly teaching students and modeling for students what each of the values mean at our school. So each month we will highlight a value. So let's say it's December. In the month of December we would highlight selfless service. I think it aligns beautifully with that giving month and that giving spirit. So again, it's an opportunity for teachers to both demonstrate and teach our middle schoolers what selfless service means in our classrooms and outside of our classrooms. So in the classroom we might talk about 'How can you be selfless to your peers? What does that look like? Is it when they're struggling either academically or behaviorally stepping in and supporting them? What does that look like outside the school?' That would kick off our first, in sixth grade, our first community service project with students, which is separate from what would happen throughout the course of that month, which would be probably a Toys for Tots or something to that effect that highlights our belief around this particular value outside our classroom. So that's a specific way we would teach it to our students. And again, most of that would happen in advisory, and we would also leverage our weekly community meetings to reinforce whole-group learning around who we are as a school. At the high school level, we want to put the onus on students. So we're still going to talk about the service in December, going back to that example, however we would expect that the students own both identifying a community service project they would want to lead and they would also be leading discussions in advisory around 'What does it mean to be a selfless student at Libertas Academy? What are our points of tensions? How does that get into our personal and professional goals?' And again, teachers will sit in on those conversations and help facilitate, but we expect the students to take a much bigger role.

[Follow-up]: So just for clarification, there's no character development piece in the schedule aside from advisory?

- Yeah, it would happen during advisory and our weekly community meetings.

[Follow-up]: And advisory groups are 30 students?

- Correct. Two teachers in the classroom.

[Follow-up]: So is it broken down, then? Do you have smaller advisories? Do you have fifteen and fifteen, or is it co-teaching for 30 students? How does that work?

- The vision for now is that each teacher will be assigned fifteen students that they're directly owning and building the relationship throughout the course of the year and with their families. So we think that fifteen is very manageable. You should have a really strong relationship with every single student, every single family member. However, we want to keep the flexibility of the group so that that teacher can interact with all 30 students or just their fifteen students if they're actually directly connected to their advisors. So there's some flexibility there and it will depend on the activity for that day. So let's say we're having a small group discussion on 'What does it mean to

be a selfless person?’ In smaller groups you can get a lot more voices in the room, you’re able to go deeper, so that would lend itself to small group discussion versus if the whole advisory is in determining what is the community service project that we’re going to lead in February, that would be an entire, whole-group discussion and both advisors would then facilitate that conversation.

21. What is unique or innovative about this school, both in general and in the context of Springfield?

- Several unique aspects. I think the interest in serving young people and families in a geographic location, a particular community, is very unique, and while as a public school open to children living throughout the city of Springfield, the fact that we’re interested in locating and focusing on a population that requires a great deal of support. I think that’s very unique.
- I will just add that for those of us who are from or are working in Springfield, frankly the North End has been underserved as a community of people in the city of Springfield, whether it be in the nonprofits working in the area, the individuals in the housing that exists in that community—and I hope I’m not going out on a limb and saying something wrong—but I don’t believe there’s a high school in the North End. And this community of the North End is wanting the city and the state and us to demonstrate our commitment to them and I think this is a huge opportunity to say to those individuals—and again, the whole city, anyone, can go the school—but we are going to place this school in the North End. They have not received the level of support and resources as a community, as a part of the city, that others have, and I think that that’s unique. And the diversity of our ability to provide a really comprehensive education experience for the young people who will be in that school and the message that we’re sending is huge for those families.
- Also what’s unique about what we’re bringing to the North End, overall in the North End schools are on average Level 4, so we’re looking to a bring high achieving, high performing school that focuses on academic rigor and character development. One of the unique pieces to that is the commitment we have and that we will hold on management to remain engaged with the families and the consistencies through each classroom through each grade level and the belief and hope that these students will bring those consistencies home. So it’s keeping not only students engaged but parents as much as possible, keeping them engaged throughout those consistencies. And that’s something that the students of the North End communities and neighborhood are not seeing currently. And I think with the longer school days, if we keep them engaged in making sure that the practices within the school are being taken home and that parents or legal guardians are also aware of those practices and kind of keep it consistent, reinforcing it.

[Follow-up]: How do you know that families from this particular community in Springfield want a middle/high school charter school?

- That was actually one of my unique comments. During our public hearing, the chair of the New North Citizens Council, one of the community partners that we’ve partnered with, actually openly wept at the mike. It was an extremely moving moment. When 56 percent of your parents haven’t graduated high school, the statistics are very clear that the educational need is there, the development personally, that need is there, and the resources just have not historically been there. With no fingers to point, we have a hole to fill and we are eager to fill it and we’ve clearly recognized a need alongside partners in the community that themselves have spoken up for the need.

- We're certainly not naïve that a lot of these families or students may come with issues and may come from, and potentially will come from broken homes. Our hope to get the families engaged. But the reality is that not all those family members are engaged. That is our mission and that is what we are going to push to, to try to change that culture. Also at the public hearing we did have an elected official who represents the area speak on behalf of the community and is pro this charter. So yes, 100 percent of the families may not be engaged but we're hoping to change that culture.
- More specifically, one of the things that was critically important to me personally, and I often don't try to speak from a personal space, is in a lot of ways I personally identify with the community and I knew that if we were going to propose this school that it was important that I connected with families and individuals, which is actually how we then got those individuals to attend the public hearing and in lots of different conversations, but to both assess what are the challenges in the community and is this something that you guys want? It was that sort of conversation with folks from the New Citizens Council, Adam Gomez, who's an elected official, meeting with families, knocking door to door, and getting a sense of that well before... I mean I was committed to this work absolutely and committed to the North End, but that was a critical piece as someone who's helping to bring this vision to life. We've connected with hundreds of families and consistently the stories they've shared of the challenges they face in their schools, and the hopes and dreams for their families, it's overwhelming, to the point that I remember leading up to the public hearing, being emotional, and I'm not an emotional person—passionate but not emotional—being overwhelmed by emotion, when both families that wanted to be there but couldn't because they were working multiple jobs, because of the challenges, coming up to me the following day and talking about how they wanted to support this school and getting that sort of support, have been overwhelming. But again, hundreds of families that we've been able to connect have supported our work, signed our petition, and the leadership in the North End that we've been able to connect have embraced us and openly worked with us in our efforts to reach out to families.
- There has been very little negative commentary that I've heard. I represent hundreds of people in the North End, and for the most part it's almost 100 percent in favor of not only Libertas Academy but charter schools in general because to an extent the population that lives there doesn't think they're getting a fair shake from the public school system, whether they're right or not. I think the best evidence is the waiting list: 4,200 families on the waiting list now who are trying to get their kids into a charter school.

[Follow-up]: What assessment have you made as a board and as school leadership on what impact the Empowerment Zone could potentially have on the recruitment and enrollment of these students that you're targeting?

- The Empowerment Zone initiative focuses on just middle school and we're proposing both middle and high school, transitioning our youngsters from middle to a high school setting. And then there are also three schools that are not included at this point in the Empowerment Zone, so there's still an opportunity to influence those young people, those families, whose kids are not attending the Empowerment Zone. So I don't think it's an either/or. I think one of the great things about charters in public education is that they offer choice, and I think that, going back to the previous question around the uniqueness, I think what we're proposing in Libertas Academy presents a very unique opportunity in the North End and throughout the city of Springfield. So given the challenges facing our students in Springfield, we need more. Certainly it's not enough. More options, especially for middle school.

- And we have connected with the Zone. We all sitting here want to see the Zone effort be very successful, and it will take time. They see this school as something they can embrace. We've already talked about ways we can collaborate. One place in particular is that there's a lot of concern about teacher talent and the ability for us as a community to recruit and retain talent. There are specific initiatives on the drawing board that I can talk a little specifically about. And we've had conversations, they're well aware of Modesto, they're well aware of the school, it's the saying, and I can't remember how it goes, 'Something floats all boats' or something like that. And we hope to work really collaboratively with the Zone. Because at the end of the day, it's not about the Zone, it's not about Libertas, it's about all these young people today in our middle school who deserve way more than they're probably getting despite the good intentions and the best efforts of a lot of people.
- And I think that might actually speak to our community as well. If the North End is lacking a high school, the fact that we're proposing a seamless six through twelve model, especially piggybacking off some of the personal difficulties we anticipate our children having, then these students have an opportunity for stability, to foster growth and personal development alongside their educational attainment while not worrying about being shuffled or picking a new school. We really feel that our seamless model can offer stability for any student.

22. Since you brought it up, this is a question I'll go back to. You talked about the difficulty of competing with other schools for hiring teachers, especially since teachers are going to be working 215 days if you add in the professional development days. What is the plan to be competitive in hiring teachers?

- By leveraging the network of Teach for America, Building Excellent Schools, other education networks in western Massachusetts, we believe that we'll be able to develop a talented, diverse teacher pipeline for Libertas Academy. Additionally, we are looking for individuals who are mission-aligned and so the schedule you mentioned earlier and some of the challenges that are ingrained with teaching in a school like Libertas, we're looking for folks who will embrace that challenge and thrive in those situations and have a proven track record of success. After going through a highly rigorous process of evaluation, those are the people we would hire. Additionally the professional development that Libertas would offer is something we hope would actually retain teachers and allow them to develop their skills. And as the school grows, we hope to promote from within and allow those teachers to have access to other positions within the school.
- Because of the Zone and because of the receivership issue going on in Holyoke, there are very deep conversations happening at your level that I'm aware of and certainly in Springfield about a really sort of intentional plan: a recruitment plan, a marketing plan, some replication of some best practice teacher training and teacher leadership programs. We all want to acknowledge that the state recently got a Gates grant, I think it's called EPIC—I apologize if I've got that acronym wrong—that's going to build on our issue of the ability to have teachers come out of higher education that are really prepared. So I think that while we've found that there's actually quite a bit of collaboration at the charter school level in the city of Springfield now around this issue of teacher talent, there's just stuff in the works between Holyoke and Springfield that really will benefit, maybe not tomorrow, but will really work for all of us who are trying to attract and retain talent. Because we have a lot to offer and our kids deserve it, I think we're going to be really successful in developing a strong teacher pipeline initiative in western Massachusetts.
- I'll just add at my level, since accepting the fellowship, that was something that I automatically started prioritizing. Having worked with a lot of various educators in my capacity as a teacher but then also as a teacher coach, I've been very intentional about keeping those folks involved in the process, whether it's providing us feedback on the proposal, ensuring that they receive our

newsletter, that they're up to date with the progress—so, having a long list of educators in my mind I will actively recruit, because at the end of the day for us, we will do a national search. With that said, we are committed to prioritizing local teachers, because at the end of the day, I don't just want great teachers in my building, I want great teachers who are committed to the school long term and committed to Springfield. So that tension is there, but again, the work has really started since day one, so I believe it's a critical piece for the success of our school.

- And one more thing in case you don't know, and I think it really demonstrates Springfield's commitment to teachers: there is a group of business leaders and city officials who are going to build a teacher housing commission in the city of Springfield. Currently with Teach for America, we've worked out a sort of temporary situation where we're offering both teachers from Teacher for America but some are in public and charter schools, and Modesto, who lives there, made a deal in the short term with a housing initiative that's already existing in Springfield. But we're borrowing from a model that many went to visit in Baltimore where there's been a very successful teacher housing initiative, and with no incentive other than we care as a community, some powerful people and elected and appointed officials developed a plan. They recruited a contracting firm that's agreed to develop this facility. We've hired the firm that's developed these in other parts of the country. He's already contracted to design it with us, and I think it just really speaks volumes to Springfield's commitment to all of the teachers in all of our schools and the ability to bring them here and offer them something special. Because we are a challenged district, we need to offer something a little more. We need to stand above the crowd and we can't wait. We think that facility once built will be renovated. It already exists. We'll be filling that really quickly and we'll be talking about another one. It's very exciting.

23. You have written and talked about the importance of having families and community members involved. What is the plan to provide families and community members opportunities to support the success at the school?

- This is something we've done and will continue to do too, is host bi-weekly information sessions about our proposal so the families are aware of what we're trying to bring to the North End and provide them an opportunity to ask questions and provide us with their insights as to the needs of the community, and that will continue for the remainder of my fellowship and in the planning year transitioning more into the recruitment side of things, so leading those information sessions actively to recruit families. During the course of our academic program in the academic year, we have lots of different opportunities in place for families to come to us in a structured manner to both share their concerns and celebrate the successes of the school, which includes the monthly cafecitos with me as a school leader as an opportunity to some degree in an unstructured space to hear updates about the school and be able to share their concerns. Even before the first day of school, our plan is to meet with every single family doing a home visit, myself as part of management and potentially an additional member of management, but most likely just me, to meet with every single family to outline who we are, what we're not, how we will support their student, and how they can be a part of that support system, again, well before the first day of school.

24. Does the key design element of strong supports for every learner go beyond the supports that all schools are required to provide?

- I would say yes. I think outside of the required hours we will provide to students, there are a couple pieces that go well beyond that, which includes our Saturday Academy, which is for our sixth graders that come to us with significant academic gaps so we're able to remediate those

students. I would say the other piece that's within the realm of mathematics that we will do is including a double period of math. One period would focus on grade-level content for that student and the second period would focus to some degree on remediation. So we would call that our procedures math class. For literacy, we want to create and we will create a strong culture of readers, and that will start in the first minute they walk through our building, during their advisory period carving out a piece of time for students to engage in silent and sustained reading every single day in school and outside of school. They will also receive two periods of literacy, one focusing on reading and the other section focusing on writing. In the first few weeks of school, we pay a lot of attention and prioritize teaching students active reading strategies such as visualizing text, really pulling out the main idea, and then we're pre-teaching vocabulary as much as possible to accelerate their reading skills as well.

- Our special education program is extremely important, and I think this is another instance where the networks of Building Excellent Schools and Teach for America play a strong role in being able to bring educators with that expertise to the table, allow them to advise Modesto and give him and the board more information around creating best practices.
- I think another one I forgot and you just reminded me of is our Focus period during the day. This is an opportunity for us to tutor students. We're using data to constantly analyze what additional support do students need and we'll provide that support during the actual school day and as soon as we'll be in those focus groups for about six weeks—again, between our benchmark assessments—so that we are targeting and supporting students in skills that they need.
- And further, as a board we would work with Modesto on the academic achievement team to actually create a dashboard following students' success and then we would disaggregate the data and look at it specifically for English language learners and special education students and as a board we will work with Modesto to ensure those students are receiving the services that they need.

[Follow-up]: Just a follow up question about the use of the Focus period and Office Hours in high school. How are those periods organized? It says that there's going to be personalized learning experiences for students. How is that going to work?

- When I visualize this section, I think this is the one that will have the most moving pieces at our school and it's exciting and it's also terrifying a little bit, but we're actually mostly excited. So parts of that time will be dedicated to ensuring that we are supporting students who might need one-on-one support, whether it's through an IEP or just if a student has significant academic gaps, then we will provide that. We would also have a subset of students who are struggling with the content. So let's say they took a benchmark assessment in September and they average well below the rest of the class, we would then select those students and prioritize the standards that will have the greatest impact on the students' learning. So we will identify those students. It might be three students, ten students - again, it will depend on the specific standards that students need to be re-taught or remediated. So there's some flexibility in those groups and they'll be in those groups for about six weeks.

[Follow-up]: So how is this going to be staffed?

- It's all hands on deck. We have our six core teachers, so they would each own a group, and then our special education teacher would support students with special needs and our certified ESL teacher would then support our language learners.

[Follow-up]: You would have eight teachers for 90 students?

- We predict that not all students initially are going to need that targeted one-on-one support, so there might be a group of 30 students in a room that are working some remediation skills and are working on an opportunity to continue to advance to the next level. So the groups will change from iteration to iteration, so that's why it's all hands on deck. At this point I think I can predict that we're going to have about eight groups of ten students and one group may not need as much support. Again, it will be based on the needs of students and the particular unit we're focusing on.

25. Can you give us an update on curricular planning for the school? What experience do you have with curriculum development, including scope and sequence? You've also said that you intend to hire a Director of Curriculum and Instruction (DCI) for the first year of operation. Has a person been identified? A series of questions here, but basically we'd like to know more about development of curriculum and who is going to oversee that development and the timeline for completion.

- The plan is to hire that person toward the tail end of the planning year. Excuse me, let me clarify because we ended up making a different choice. That person would officially start in year one, however, we would identify and officially hire that person in the planning year so we can begin to collaborate as much as possible in setting the vision for the school. The person who's owning that work now until that person is on board is me and that's what I highlighted earlier the work I'm tasked with between now and August 1, to maximize my residency and really throughout the planning year. To highlight a couple of the things that I bring to the table that gives me confidence that I'll be able to do this successfully is that not only did I work as a classroom teacher, but I was in content-based ESL (English as a Second Language) support, which meant that I was an English teacher for my ESL students. So we had a huge ESL population, we had about 150 students. I taught about 90 students. I taught it as a regular English class based on levels. If you're level one, it looks significantly different than a level four or level five. A level five was more aligned with the curriculum. So I've experienced building middle school ELA (English language arts) curriculum. When I transitioned out of the classroom and into TFA (Teach for America) staff, one of the things that I took on was creating the vision of excellence for ESL for the entire Memphis region. So again, big picture planning across all grades K through 12, I had some experience with that, which included coaching teachers in a K to 12 classrooms. I had one teacher who was a kindergarten teacher and an eleventh grade teacher and experience building lesson plans and unit plans with that teacher. So I have some of that. To supplement that, what I plan to do between now and August 1 more specifically as I mentioned earlier is looking at the standards, actually creating learning objectives for each level based on the standards, looking closely at the assessments that our students will take as much as possible. I know we're in a little bit of a transition year, so they might shift a little bit, but looking at the assessments, not just what students are expected to do at the end of the year but also how and what skills we would have to remediate. So we have a clear plan in place on here's what we need our students to learn in sixth grade, here are the additional skills that our students need to have and if they don't have we need to remediate them by when? So again, during the planning year I'm tasked with creating that and providing that to our DCI who would then work with teachers to create their end of the year assessments, their long term plans, their unit plans, and their lesson plans. All of that would happen during our professional development well before the first day of school.

[Follow-up]: Modesto, you know your qualifications best, obviously. When thinking about a DCI, because this isn't a position that you've hired yet, is there a particular background or skill set that you're looking for that would best enable you as a team to move forward and be really effective at what it is that needs to take place prior to opening?

- There's somebody I'm in conversations with to persuade them to come aboard. So I'll name the qualifications of that person. So this is an individual who has worked in education for about 15 years now, has taught in middle school and high school, which is a critical component, going back to what you said, backward planning. Having a clear understanding of what a high performing high school looks like is a critical part, so when we're creating our curriculum it's not just for middle success but high school success, including in the middle school years. So that's critically important. The second piece is that he or she is a math whiz and that is something that I myself don't have as much experience, so someone who can complement, that is so key. We can have conversations around lesson planning, we can have conversations around unit planning, but on a really high level once we get to the specifics, it's like what is the best strategy on how to teach our students how to convert percentages, or whatever that is. I can come up with a couple, I can do some research, but having someone who has taught that and can speak from a place of both passion and clarity around math is something I admire because I want all of my teachers to be just as passionate about their content. Having a team of, like, 'The literacy piece I own, I'm a nerd when it comes to that, the math piece, you own, you're a nerd about that,' we can create that really well balanced, strong academic culture in our school.

[Follow-up]: You mentioned that this particular person you're attempting to persuade and motivate if you are awarded a charter appears to be a veteran. Have they had a leadership administrative role within a school?

- In a school and now currently coaches teachers for an entire region, yes.

[Follow-up]: So the DCI, now especially since you know that their expertise is in both middle and high school, is there an expectation that the DCI would take on the middle school principal role in Year Three? It was challenging for us to understand the order of events, whether that person would be essentially promoted or in fact you would hire a principal above them because the model you have is that individual reporting to a principal.

- It would really depend on the individual. Ideally we want to hire internally whenever possible, building our bench so that the DCI or the dean of students can step into that role. It's so critical. So it's either school culture or academics and being an expert in one or the two and then beginning to coach that person on the other piece is critical, the middle school principal. I would actually say now that that's the person that I'm also thinking about that because I would have to see them in action and see the degree to which they can incorporate that other piece, which is school-wide culture, which is so critical.
- I would add that that I can provide support and expertise to Modesto in terms of training a DCI, what does that look like, is that person potentially a right fit for principal, what are their skill sets, where do they still need to grow, and what is your plan to do that over time?

26. What will effective use of student assessment data look like on a day to day basis at the school?

- One of the things that I've already highlighted is how it will impact our Focus groups. I think that's one critical piece. The other thing that will impact our program is the homework. We're

committed to providing homework every single day because we believe it reinforces what students are learning. We want that homework to be meaningful for students, so we're using data to figure out what are the things that we still need to remediate and re-teach and provide students with practice, and that will be included in there. The other thing I would highlight is at the end of each benchmark testing, we will provide a whole day for teachers to analyze the data, and then four days, which we'll consider a whole week, a week to then re-teach or remediate as needed. So again, we're being really responsive to the data that we're receiving from students in a daily but also in a cyclical manner.

[Follow-up]: You said the data days happen how frequently?

- We have five data days. Every six weeks, basically and then a week to re-teach.

27. How did you go about determining the academic performance targets? These are the ones that are included in the draft accountability plan. You're talking about going from 60 percent to 90 percent proficiency. It seemed like you were talking about individual students wanting to move them over time from 60 percent to 90 percent.

- The thing is, it's both. We have goals for specific students but also average goals for an entire grade. We looked at historical data from other high-performing charter schools and thought through what is reasonable based on the way we're structuring our entire program and the way we're using data so we're delivering upon the promises we're making to families. And the goal is, the way I envision middle school holistically, it's an opportunity for us to remediate students while also teaching grade-level content so that they're able to transition to a high school that is truly college preparatory. In order for us to do that, we have to have very ambitious goals that are academic-driven to ensure that our students are then prepared for the demands of a high-performing high school and college.

[Follow-up]: Were you looking at what other schools accomplished or what other schools set as goals? How do you balance ambition with being realistic?

- It was definitely a combination of both. If you looked at the top quartile of BES schools specifically, what they can do with students, we should be able to do that on the bare minimum. We're shooting much higher, but the bare minimum is the bar of excellence for us.

28. What role does advisory play in the student ownership of learning, including their individual goals and the actions needed to achieve them?

- Advisory, since teachers will support 15 students, teachers are expected to be checking in with students one-on-one on a weekly basis and they're expected to call home on a bi-weekly basis to update families beyond our weekly report on what is happening in the classroom so parents understand the strengths and weaknesses of the particular student. So advisory would be a space in which during that check-in with students teachers are going through, 'Let's look at the data on this, look at how many merits and demerits you've earned this week. Let's look at your average GPA, your average grade, and let's actually set goals for the day, for the week, and for the semester, and let's continue to revisit that on a weekly basis to see the degree to which you're actually meeting or exceeding that goal, or failing to meet that goal.'

[Follow-up]: It sounds like many things are happening during advisory. You talked about it being an opportunity for sustained silent reading. It's also when you're doing character development instruction. You're checking in once a week. How will all of these pieces take place during that one advisory period?

- We're fortunate that advisory happens every single day and it happens at a structured time. We have the flexibility to incorporate different pieces of that. What we will train our teachers to do is to execute several things simultaneously. So for example, during silent sustained readings, teachers would expect to pull students out and have that one-on-one conference while the rest are then engaged in silent sustained reading. If there is a day that is dedicated to our character development mini-lesson, then that day we would not engage in silent sustained reading or we would cut it short. So there is a great deal of flexibility and we're going to work as a team to create a plan to ensure the how and the when with our teachers, and again, also training our teachers to be nimble within that system.

29. How will the structure of the school day provide opportunities for students to exercise independence and self-regulation with growing maturity?

- In the middle school, I think there is a little bit less of that, and the rationale here is that we're going to have 90 different students coming into our school from 90 different backgrounds, 90 different homes, potentially from multiple different schools, and we're trying to grab all those 90 students to then meet and live under one expectation and that's a challenge and we acknowledge that. So therefore, we're going to ensure we have a really highly structured, well thought out environment for our students, so they're able to successfully meet our expectations. And when they're not, we can coach them to meet those. As students progress through our system and mature, we expect to evolve with our students. One of the things I highlighted earlier was the idea that in high school our students would own a great deal of the character development that our students are leading from the front, and we absolutely believe that. So academically an example that comes to mind for me is in middle school we expect teachers to be providing a lot of very specific directions, so not only movement but also participation, what they should be saying, for how long, to the point that you're like, 'OK, we get it,' but we want to be super clear on the expectations for students. In high school that shouldn't be the case. The teacher should ask the questions, students may raise their hands, they might just have a conversation, so it will feel a little bit loose. But the idea is that our students have truly embodied and understand who we are as a community, and they've been coached to live that out so they can self-regulate at the high school level and when they enter college, we can say with a degree of confidence that they have actually truly internalized who we are and our values for themselves.

[Follow-up]: The scheduled enrichment opportunities take place after school. What is the rationale? It happens during the school day for middle school and based on the schedule that was submitted, it appears to shift to after school for high school.

- I feel like I have a lot of concerns, lots of good things I often think about, and one of those things is ensuring that we retain our students, and based on conversations with other school leaders, especially ones who have a six through twelve program, one of the things they're challenged by is going from a middle school to a high school where students want to play sports, where students want to be part of the drama club, et cetera, additional programs that usually happen after school. So we're creating a structure there to communicate with families. We're also going to do that. We're going to try to do that to the best of our ability and work closely with community partners to also develop those. That's why it's included in there for us.

30. Could you give us an update on community partners and how they may be involved either before the school begins or after it's running?

- We've identified some very strong community partners within Springfield as a whole and specifically the North End. When I talked about our public hearing, I mentioned the chair of the New North Citizens Council, which has been integral in helping us reach students and their families. But more than that we're developing relationships with community organizations such as Stand for Children, also Neighbor to Neighbor, and have identified some players in the bigger picture that also interest us such as community centers, the local Boys and Girls Club on Carew Street, or even local church entities, such as the Restoration Worship Center. Church entities are very strong in the community. So we recognize going above and beyond the traditional partners and how we can work within the framework of the North End to develop these afterschool programs in things that are already happening within the city to go above and beyond student support and recruitment.

[Follow-up]: So they would be involved in doing afterschool work?

- I would say now the priority would be student recruitment—so, leveraging those relationships to get us in front of families to let them know what we're all about and what we're proposing. When we open, working closely with those relationships that we've cultivated to again figure out what are the ways we can collaborate and support.
- I know an incredible drama team in the North End.
- And several of us have connections in that we can engage community partners, not just in the North End but throughout the city of Springfield. And as you know, we have about five universities and colleges, and they offer tremendous resources in terms of student interns.

31. [For Modesto Montero]: What is your personal philosophy regarding the management of student behavior and how is your philosophy reflected in the proposed approach to student discipline?

- It's definitely a very different philosophy for middle school and high school, so I'll speak from the place of middle school, if that's OK. I believe that students will rise to whatever bar we set for them, both behaviorally and academically. If we lower the bar, that's where students will go. So behaviorally, we're going to have that highest bar for our students because it's really what they can achieve. With that said, I'm also not naïve. I've worked with middle schoolers. They're rambunctious, they're wonderful, loving human beings but they also require a lot of attention and follow up with them because they're still developing a sense of identity and who they are. So with that in mind, it's like, we've got a really high bar for you, and for those of you who struggle to reach that bar, either consistently or once in a while, then we're putting those supports in place to ensure that student is constantly growing, and not from a place of judgment but a place of love. We want you to be here, this is why we're doing that and we're not going to lower the bar for you and we get that this is a point of tension for you to have these difficult conversations, we're going to follow up the consequence and then within seconds, once you're ready to join the group, you'll be allowed to join the group and we'll have that restorative conversation as needed.

[Follow-up]: Can you talk about high school?

- Sure. I still believe that it always comes from a place of love, but I do think for high schoolers it becomes more of a conversation around choice. You have a greater understanding developmentally to some extent of what is right and what is not and you're making the choice—our middle schoolers are as well, but they need significantly more support—in high school you're making the conscious choice and you've been with us a lot longer so you'll know what our bar is and now you're choosing not to have that bar. So I think the degree in which we coach students and have the conversation, I think the tone will shift and the ownership we put upon our students. It's actually for you to process and for you to come to a solution rather than for us to be super clear on the support and do the hand holding. So I think there's a greater release there for a student for them to process and identify the choices they're making that are landing them where they're at, versus middle school where they need a lot more support from us and guidance.

32. How will the board ensure that the discipline policies of the school do not impact student access to educational opportunity, disproportionately target specific student populations, or result in increased attrition or dropout rates?

- For students to learn, they have to be in a safe and nurturing environment and we as a board and as a school must ensure that that environment exists at Libertas, and so that means we need a clear line of things that won't be tolerated, whether it's violence, whether it's drugs, whether it's other things in our handbooks and our guides from ESE. That's the first section. After that, what we would do is work with our parents who are actively seeking the best choice to sign a commitment so that they understand all the rules and regulations of the school, as well as we will participate in home visits and an extensive parent orientation. At the same time, we realize that we cannot deny a student based on their parents' lack of involvement. That's really the crux of the work, is working with students that don't have parents who can provide the signatures, who can't get on the phone at 8:30 or 9:00 and talk about an issue that happened in school. As a board and as a school, we have made and will continue to make an effort to support those students in every single way in order for them to have every chance at earning their high school diploma, as well as transitioning to the college of their choice. Again, that's not an easy thing to do, but we are working with BES in order to make sure all of the guidelines that we are asking parents and students to follow are in line with state laws and regulations. But we're also looking outward. We're looking around the country to find what are the ways we can truly engage students and parents in order for them to want to follow the rules. Initially we want to keep kids in school. We do not want kids to be suspended or be sent out of class. We want to ensure that students are able to stay in the school and so we're going to work with Modesto to make sure teachers understand that they are able to keep students in the class through their management processes.
- I think at the policy level and also at board meetings, we'll be looking at reports in terms of enrollment, retention, suspensions, and begin to understand the trends. And if we see over a period of time that there are significant increases in suspensions, whether it's in school or out of school suspensions, it would be like a flag. So it's the board's responsibility to track through reports and also flag any potential problems. It is the management's responsibility to act on those policies to ensure that our youngsters are having very positive experiences and that they're managing those behaviors. And the only way we can do that is through our reporting and data. Data-driven decisions and oversight.

[Follow-up]: What is the expectation of the board on how to hold Modesto accountable for results? What metrics are important to you and what is your expectation around the response to particular metrics? So for instance, in school/out of school suspension rates are through the roof, or they appear to be disproportion towards students with disabilities. What is the board conversation about that data and what it is that you would communicate to Modesto as the individuals who hold the charter?

- The academic achievement committee will work with the head of school Modesto to develop that dashboard which will include those indicators and we will track Modesto based on those indicators as a board and through that committee we have determined.

[Follow-up]: What do you, the board, do with the data? How do you use it?

- I think you set targets. If there's an increase in the number of suspensions, we would then negotiate with Modesto to reduce that number, to bring it down. So I think you set targets based on the data and based on best practices and research. We would perhaps consult with BES and find out what is a fair expectation or level that we can expect, based on our student population, and then set those targets and then monitor and track those targets.
- We'll create an action plan essentially that has those benchmarks on it and we would hold Modesto accountable for those particular benchmarks on the action plan. If he's not successful in increasing the achievement of students at that time, then we as a board would approach figuring out who can actually give our students what they need. Obviously that's a very tough decision and it's a decision as a board we would not make lightly, but we are in a position to serve students, not Modesto, not any other entity but the students who are in the building.
- Let me just say one other thing. Yes we have the data, Modesto this isn't looking good, we see too many suspensions, incidents, whatever the issue is. We have an obligation to look at that. We have an obligation to ask questions about why it's happening. And then we have an obligation to bring our resources to the table, not to run the school, but to say, 'How can we be helpful? What do we need to bring to you, whether it's consultations, whether it's mental health services, or if it's additional professional development for the team?' It's not enough to say, 'The data stinks. Fix it.' We hope we have some real talent on our team to be able to get at those issues, but it's our responsibility as well because we signed on for this, that we need to look to our resources or others to say, 'What is behind this fact, whatever the fact is? And how do we collectively own it and correct it?' If at the end of the day it's not corrected and it is an issue of performance and we really have that question about any one of our team members, although we will personally evaluate those other team members, the buck the stops there. And we hope we aren't in that place, but we have an obligation as a board to assist in the correction of it.
- And the question's directed at the board, but the resources are there in terms of what should good numbers look like and what do we do if we find that students with disabilities are being suspended at a higher rate than students who do not have disabilities? Then there's an issue where I can step in and support not only governance but also management in creating a plan about how do you address that specific issue? That is an issue that has occurred in a lot of places and is one that specifically you need to strategize around, how to, when you have really high behavior expectations, how do you work with students with disabilities where it's more challenging for them to meet those expectations, and do you have a place for that to happen?