



Charter School Annual Site Visit Report  
Charter Schools Accountability and Support  
2011-2012

**DR. RICHARD IZQUIERDO HEALTH AND SCIENCE CHARTER SCHOOL  
ANNUAL SITE VISIT REPORT**

**MARCH 2012**

## Part 1: Executive Summary

### **School Overview and History:**

Dr. Richard Izquierdo Health and Science Charter School is a middle/high school currently serving approximately 205 students in sixth and seventh grade.<sup>1</sup> The school is under the terms of its first charter and is projected to expand to eighth and ninth grade during its current term, which will be up for renewal during the 2013-14 school year. If approved for renewal, the school is projected to reach its full grade span, 6-12, during the 2016-17 school year. In 2011-12 school's applications were equal to or below available seats so no lottery was conducted<sup>2</sup>.

The school is currently co-located in DOE space in District 12 at 800 Home Street in the Bronx. According to an ATS data pull in April 2012, the student body of Dr. Richard Izquierdo Health and Science Charter School includes 88.5% Free and Reduced Lunch, compared to 83% in the district, 16.5% special education students compared to 18.3% in the district, and 8% English language learners compared to 19% in the district.<sup>3</sup> Student attendance for the 2011-12 school year to date was reported by the school to be 93%<sup>4</sup>.

The school is in its second year of operation. John Xavier was principal during its first year; Frank Steele began as principal in 2011-12. The school will be getting its first graded Progress Report in 2012. In its first year of state assessment, the school's ELA scores were below city and district results, while its math scores were above city and district averages. On the NYS ELA test, 20.4% of the school's sixth graders scored Level 3 or 4, compared to the citywide score of 43.6% and the District 12 score of 32.8% at Level 3 or 4. In math, 57% of its sixth graders scored at Level 3 or 4 compared to 56% percent of the city's sixth graders and 40.8% of the district's sixth graders<sup>5</sup>. Dr. Richard Izquierdo Health and Science Charter School had average (Safety and Respect) and below average (Academic Expectations, Communication and Engagement) results on its 2011 DOE School Survey.

### **Annual Review Process Overview:**

The New York City Department of Education (NYC DOE) Charter Schools Accountability and Support (CSAS) team conducts an annual site visit of charter schools authorized by the NYC DOE. The site visit is designed to address three primary questions: is the school an academic success; is the school a fiscally sound, viable organization; and is the school in compliance with its charter and all applicable laws and regulations? To ascertain matters of sustainability and strategic planning, we also ask about the school's plans for its next charter term. The visits are conducted by representatives of the CSAS and last the duration of one school day. The annual site visit begins with a meeting with the school leadership team. Afterward, the reviewers visit classrooms and hold brief meetings with available administrators and teachers. Areas of evaluation include, but are not limited to: academic goals and mission; curriculum and instruction; school culture and learning environment; assessment utilization; parent engagement; government structures and organizational design; community support; special populations; and safety and security. The site visit is intended to be a snapshot of the academic year and reflects what was observed at the time of the visit.

The following experts participated in the review of this school on March 8, 2012:

- Richard Larios, Senior Director, NYC DOE CSAS
- Scott Torres, Director of Operations, NYC DOE CSAS

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<sup>1</sup> Self-reported on school's ASV Data Collection Sheet (2/28/12)

<sup>2</sup> Reported in interview with school operations lead during ASV on March 8, 2012.

<sup>3</sup> NYC DOE ATS system, pulled April 2012; the school's self-reported (2/28/12) numbers for special education and ELL students were slightly lower than the ATS data pull: 14.6% (30 of 205) for special education students and 7.8% for ELLs (16 of 205, with two students declassified.)

<sup>4</sup> Self-reported on school's ASV Data Collection Sheet (2/28/12)

<sup>5</sup> NYC DOE website – [www.schools.nyc.gov](http://www.schools.nyc.gov) (search: test results)

## Part 2: Findings

### Areas of Strength:

- Instruction in observed classrooms featured improved consistency and focus from previous year's Annual Site Visit, with a stronger focus on ELA and writing across the curriculum and improved support from special education/ELL staff.
  - Common lesson structures were in place, aided by use of consistent lesson plan template adapted from Skillful Teacher (Research for Better Teaching).
  - Each class had two learning objectives, a literacy objective and a Common Core subject specific one.
  - The school implemented the Danielson Teaching Framework as a resource for reflecting on and evaluating effective instruction and, according to administration, for teachers to set professional growth goals.
  - To help improve its NYS ELA results, the school dedicated professional development and teacher collaboration time to its five-step writing process initiative, increased student exposure to nonfiction texts, and school-wide participation in the Reading Challenge (25 books).
  - The school's results on the NYS Math assessments in 2011 were on par with citywide results, impressive for a first year school, and well above district results at Grade 6.
  - The school's special education coordinator and interviewed teachers reported in interviews on the day of the visit that clearer structures and increased opportunities for collaboration have resulted in more push-in support for students with IEPs and other at-risk students.
  
- On the day of the visit, observed classrooms were orderly and print and resource rich.
  - The print environment included instructional and behavioral supports that were common to all classrooms, as well as student work displays.
  - Learning objectives were posted in all observed classrooms.
  - Teachers and students had access to varied instructional resources, including texts, activity sheets, electronic whiteboards, laptops for staff, instructional videos and software.
  - Interviewed teachers spoke positively about responsiveness of administration and Board to requests for instructional resources. Interviewed teachers said they were "better supported this year than last year" by administration and by each other.
  
- Overall school climate on the day of the visit was positive and focused on student learning, with students in most observed classrooms consistently on-task and responsive to instructional directions and learning activities.
  - Interviewed teachers spoke positively of the "morning huddle" where the entire staff gathers in the school hallway prior to the arrival of students, describing it as a positive start to the day.
  - Administrators and teachers reported that the school, with Urban Health Plan (UHP)'s support, re-vitalized its Student Advisory Program and better relationships between student and teachers have resulted from that and support for extracurricular activities (boys and girls basketball, a talent show, and student council).
  
- The school's Professional Development program provides support for teachers prior to the start of each school year and a variety of ongoing supports during the school year.
  - The school added daily collaborative planning time and a weekly early dismissal day (Friday) for teacher professional development, for which interviewed teachers expressed appreciation, saying it helped with planning, communication, and professional growth.

- The school offers ten days of staff development prior to the opening of school each year and a three day mid-winter “academy” to support the school’s Annual School Plan implementation and professional growth of staff.
- School responded to feedback from teachers to make its PD more responsive and supportive of its staff.
- Interviewed teachers cited lesson plan review, administrative support, use of assigned mentors in math and ELA from CEI-PEA (Center for Educational Innovation-Public Education Association), and feedback from Ms. Cintron, who is both ELL Coordinator and serves as a general instructional coach, as being helpful in improving their craft.
- The school has a partnership with Urban Health Plan (UHP), a community health care provider that supports the implementation of the school’s health and science theme.
  - While the benefits to the school of this partnership are still developing and more can be done to support health and science instruction and after school activities, UHP and the school have a partnership co-planning team that includes physicians and teachers to address these opportunities.
  - UHP has helped with the Student Advisory curriculum, including anti-bullying and youth development materials, and provided guest speakers to the school.
  - Representatives of UHP are included on the school’s Board of Trustees.

### **Areas of Growth:**

- The school should continue its focus on improving the quality and consistency of instruction and its overall academic performance, particularly improving its ELA results.
  - The percentage of sixth grade students (20.4%) at Dr. Richard Izquierdo Health and Science Charter School scoring at level 3 or 4 on the ELA state assessments was significantly lower than district (32.8%) and city averages (43.6%).
  - Despite impressive first year results on the NYS Math assessments, with the percent of Izquierdo students attaining level 3 or 4 (57%) exceeding district averages (40.8%) and being on par with citywide results (57.3%), the school will need to continue to improve its results if it is to meet its charter goals.
  - Instruction in classrooms observed on the day of the visit were improved in consistency and focus, but rigor, differentiation, and increased student ownership of learning can yet be improved through coaching, professional development and peer observation.
    - Identified learning objectives were not consistently stated as desired learning outcomes;
    - connection between Do Nows and upcoming lesson were not always clear and some Do Nows took disproportionate amounts of time, intruding on instructional time for new lessons;
    - challenging tasks, discussions, and activities were not commonly observed on the day of the visit;
    - on the day of the visit, few examples of differentiation other than by grouping were observed, while several missed opportunities to challenge some students in tasks and discussions or to provide more support for others who struggled with a task or response were observed.
  - A large percentage of the staff are first or second year teachers so the school should continue its professional development support and encourage continued peer and mentoring support for staff, as well as ensure that the supervision and evaluation process serves to identify excellence and support development where growth is necessary.
  
- The school should continue to develop its use of data to monitor learning and inform instruction.
  - The school should continue to develop and advance its use of Acuity as a resource for instructional decision-making and assessment development. The school needed to re-launch its use of Acuity this year, which according to school leaders was not effectively used the previous year, leaving the school without valid comparable data for the current school year. As the school matures it will want to access longitudinal data for context, prediction, and performance evaluation over time.
  - School leadership expressed confidence that NYS ELA and Math results would improve this spring, but largely based on anecdotal or observational reasons. School leaders identified the school's teacher created assessments as an area that needs continued improvement or change and is encouraged to continue this work to build a comprehensive assessment system that provides the school with reliable and valid data to inform instruction, proactively monitor progress and make timely instructional adjustments to meet the needs of all learners.
  - The school has done foundational work on Individual Student Success Plans (ISSP) for students and should continue this work, leveraging opportunities like student advisory time, to engage students in use of academic data and owning their progress on the path to college readiness.

- The school should also leverage its increased teacher collaboration time and team data reviews to refine its use of data to target instruction at more sophisticated levels, for more flexible grouping, targeted differentiation at small group and individual student levels, and ensuring that students who have mastered concepts, skills, and content are challenged.
- Izquierdo should continue to enact measures to be in full compliance with the 2010 amended Charter Schools Act.
  - While its Free and Reduced Lunch and Special Education enrollment numbers are comparable to CSD 12 averages and, in the latter case, city averages as well, for the second year in a row, Izquierdo is below CSD 12 averages with a population of 8% ELLs, compared to CSD 12's ELL rate of 19%<sup>6</sup>.
  - The school reported using a variety of recruitment strategies and is developing multi-language marketing materials to reach out to families of English Language Learners.
  - The school should continue to refine and document its outreach strategies for recruitment and retention of ELLs in order to reach levels comparable to district CSD 12.
- In its second year of operation, Izquierdo has gone through significant (though not too unusual for a young school) turnover of leadership and staff. At the time of the visit, the Board had proposed to the CSO a change in its leadership structure, adding a chief executive officer to be school leader reporting to the board with instructional leadership reporting to the CEO. The intent was to improve financial and operational management while also allowing the instructional leadership to have one focus: improving instruction.
  - The current principal and instructional leader is the second in two years. The proposed change will represent a third consecutive year of leadership change.
  - Teacher turnover, according to the school's ASV Data Collection Form, was 31.2% (5/16) from last year to this, which means that with expansion to a new grade an even larger percentage of teachers was new to the school. With continued grade expansion and additional change in school leadership next year may include a similarly high percentage of new instructional staff.
  - It is important entering the middle year of its initial charter for Izquierdo to establish a stable and quality staff, school culture, and sustaining systems for recruitment, supervision and evaluation going forward. In addition, the Board and school leadership should continue be intentional about managing this transition to maximize the intended benefits and minimize the potential disruption
- While the operational and financial health of the school appears sound, turnover among operations staff has been high.
  - The Izquierdo school organization chart calls for 3 operations staff: a director of operations, an operations associate, and a finance and human resources associate. On the day of the visit only the operations associate was in place because the finance associate had been on maternity leave since December and the director had recently departed the position. Izquierdo retained an additional consultant from Charter School Business Management (CSBM) to help back-fill, but the function still appeared somewhat stretched. For example, the school had not yet documented a lottery-day plan for the upcoming lottery logistics.
  - Finally, when the school introduces the CEO position, it will be beneficial to bring in-house and increase the rigor of the analysis and strategic management of financial statement information to provide a strategic vision to school financials and how they can best contribute to the fulfillment of the school's overall educational vision.

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<sup>6</sup> NYC DOE ATS system, April 2012

- The school should continue to work on its parent and community engagement and overall stakeholder satisfaction, particularly in reference to parents, staff and students.
  - Results on the school's first DOE School Survey were below average in three of the four categories (Academic Expectations, Communication and Engagement), with the fourth, Safety and Respect scoring at average.
  - Participation rates on the DOE Survey were below city averages for Parents (42% to 52%) and Teachers (80% to 82%); Student participation above (98% to 83%)
  - A small group of parents are involved in the school's parent association and the school should work to expand involvement in the association. Several meetings involving parents and school leadership and the Board occurred around the time of the site visit with some positive beginning conversations around areas of concern, including safety, policy, and communication. The school should continue its efforts to improve communication between administration and parents, the Board and parents, and staff and the Board.
  - The school should also continue to work and build on its efforts to further engage students in the life of the school through student advisory, student council, various extracurricular and cultural activities and its partnership with United Health Plan.

## Part 3: Essential Questions and Accountability Framework

### The CSO Accountability Framework

To help NYC DOE authorized charter schools better understand what we mean by success for charter schools, the NYC DOE's Charter Schools Office (CSO) has developed an Accountability Framework build around four essential questions for charter school renewal:

1. Is the school an academic success?
2. Is the school a fiscally sound, viable organization?
3. Is the school compliant with its charter and all applicable law and regulations?
4. What are the school's plans for its next charter term?

#### 1. Is the School an Academic Success?

##### 1a. High Academic Attainment and Improvement

Schools that are academic successes have many of the characteristics below:

- Meet absolute performance goals established in school charter
- Meet student progress goals established in school charter
- Are closing the achievement gap for at risk students, including special needs and ELL students
- Are surpassing performance of DOE identified peer-schools
- Are surpassing performance district and city proficiency or better averages
- Are meeting other rigorous academic and non-academic goals as stated in school's charter

Evidence for success might include, but not be limited to, the following depending on school configurations:

- Grades 3-8 NYS ELA Results (absolute performance, individual student progress, comparative performance to similar schools, home district or city averages, progress for at-risk populations)
- Grades 3-8 NYS Math Results (absolute performance, individual student progress, comparative performance to similar schools, home district or city averages, progress for at-risk populations)
- Grades 4 and 8 NYS Science Results (absolute performance, individual student progress, comparative performance to similar schools, home district or city averages, progress for at-risk populations)
- Grades 8-12 NYS Regent Exam Results
- When applicable, NYSAA or other approved alternate assessments results
- HS 4- and 6-Year Graduation Rates (absolute and progress, overall, for at-risk student populations)
- Grades 8-12 College Readiness Credit Accumulation
- Percentage of Students Applying to and Being Admitted to College
- Percentage of Students Taking AP Courses and/or Percentage of Students Passing AP Courses
- Results on state accountability measures
- Charter School Academic and Non-Academic Goals
- NYC Progress Reports

##### 1b. Mission and Academic Goals

Schools with successful missions and goals have many of the characteristics below:

- Have an animating mission statement that staff, students and community embrace
- Set ambitious academic and non-academic goals that entire school community knows and embraces
- Have processes for regular monitoring and reporting on progress toward school goals
- Have processes for adjusting strategies in support of goals as appropriate in response to monitoring data

Evidence for successful missions and goals might include, but not be limited to, the following:

- Mission statement, charter, external documents (parent and family handbooks, school website, etc.)
- Annual reports, school improvement plans, leadership board reports
- Board agendas and minutes
- Parent, student, and teacher satisfaction surveys
- Participation at parent-teacher conferences, school advocacy events, participation in academic goal related programs

### **1c. Responsive Education Program**

Schools with successful education programs have many of the characteristics below:

- Are self-reflective and examine practice based on outcomes against goals
- Have well-thought out curricular programs that are aligned with NYS learning outcomes as described by state standards and the new Common Core Curriculum.
- Use instructional models and resources consistent with school mission and that are flexible in addressing the needs of all learners
- Have defined strategies that they can measure and monitor for closing the achievement gap
- Offer defined opportunities for remediation and acceleration
- Implement a coherent and effective interim assessment system (e.g., use of formative, interim, and summative assessment data) for monitoring progress, predicting performance, and adjusting instruction
- Have an effective process for supporting improved classroom instruction, including frequent observation and feedback
- Have effective strategies and quality instructional programs for addressing students with special needs and ELLs
- Use a defined process for evaluating curricular tasks, programs and resources for effectiveness and fit with school mission and goals

Evidence for successful education programs, in addition to positive results, may include, but not be limited to, many of the following:

- Instructional planning documents (alignments, scope and sequences, curriculum maps, unit and lesson plans, etc)
- Student/teacher schedules
- Classroom observations
- Student Intervention / Response to Intervention program description and resources
- Interim assessment results
- Student and teacher portfolios
- Data findings; adjusted lesson plans
- Self-assessment documentation
- Professional development plans and resources

### **1d. Learning Environment**

Schools with successful learning environments have many of the characteristics below:

- Have a strong academic culture that creates high academic and behavioral expectations in a way that motivates students to consistently give their best efforts
- Use a comprehensive approach to student management, including positive behavioral expectations and a clear discipline policy to build and sustain a safe, orderly, and supportive classroom environment
- Provide for safe, respectful, efficient transitions, hallways, cafeteria, yard, etc.
- Have classrooms where academic risk-taking and student participation is encouraged and

supported

- Provide opportunities for students to actively engage in their own learning and in the life of the school
- Have a plan with formal or informal structures or programs in place that provide students opportunities to develop as individuals and citizens (for example: a character education, citizenship, or community involvement or service program).

Evidence for successful learning environments may include, but not be limited to, many of the following:

- School mission and articulated values
- Student management plan (code of conduct, school values, discipline policy, positive incentive system, etc.)
- Student attendance and retention rates
- Student discipline data
- DOE School Survey student results
- DOE School Survey parent and teacher safety and respect results
- Self-administered satisfaction survey results
- Leadership, staff, and, if appropriate, student interviews
- Classroom observations
- Scheduled student engagement opportunities (e.g., student advisory, internships, student government, student led conferences, peer tutoring, peer mediation, etc.)

## 2. Is the School a Fiscally Sound, Viable Organization?

### 2a. Governance Structure and Organizational Design

Schools with successful governance and organizational design structures have many of the characteristics below:

- Operate with a clearly articulated governance structure, compliant with its charter and all applicable laws and regulations
- Have a capable Board of Trustees with appropriate blend of skills and experiences to provide oversight and strategic direction to fulfill the mission and goals of its charter
- Have a Board that is fully compliant with all applicable laws and regulations, particularly but not limited to open-meeting laws and conflict of interest regulations
- Have developed a succession plan for board and school leadership, consistent with the charter and Board by-laws, to ensure continuity of direction and leadership over time and despite circumstance
- Implements a school leadership structure that is aligned with charter and that is sufficient to fulfill school's mission and achieve its accountability goals; it also has clear lines of accountability for leadership roles, accountability to Board, and, if applicable, relationship with a charter management organization
- Have timely and appropriate access to legal counsel
- Implemented a process for monitoring and evaluating the effectiveness of the school's organization and leadership structure
- Have instructional leadership staffing and support structures that holds staff accountable for student learning outcomes and provide regular feedback on instruction to teachers

Evidence for school governance and organizational design may include, but are not limited to, the following:

- School charter
- Board by-laws, roster, trustee resumes, meeting agenda and minutes
- Annual conflict of interest forms
- Staff roster, job descriptions, staff handbook, operations manual
- School calendar, professional development plan

## **2b. School Climate and Community Engagement**

Schools with a sustaining school climate and engaged parent and community support have many of the characteristics below:

- A healthy professional school climate that is collaborative, student centered, and open to parents and community support
- An effective process for recruiting, hiring, supporting, and evaluating leadership and staff
- A flexible, data-driven approach to professional development for all staff
- An effective way of measuring and monitoring core constituency satisfaction (parent, staff, and, when age appropriate, student), including the DOE School Survey
- Effective home-school communication practices to ensure meaningful parent involvement in the learning of their children
- Strong community-based partnerships and advocacy for the school

Evidence for school climate and community engagement may include, but not be limited to, the following:

- DOE School Survey satisfaction parent, teacher, and, if appropriate student results
- Student retention and wait list data
- Staff retention data
- Leadership, staff, parent, student interviews
- Student and staff attendance rates
- Parent attendance at parent-teacher conferences
- Parent association meeting calendar and minutes
- Community partnerships and sponsored programs

## **2c. Financial and Operational Health**

Schools that are responsible stewards of public funds and effective, sustaining organizations have many of the characteristics below:

- Consistently meet its student enrollment and retention targets
- Annual budgets that meets all short- and long-term financial responsibilities with available revenues
- School leadership and Board that oversee financial and operational responsibilities in a manner that keeps the school's mission and academic goals central to decision-making
- Boards and school leadership that maintain effective internal controls of finances to ensure integrity of financial management and a proactive approach to mitigating risk
- Consistently clean financial audits
- If applicable, strong, accountable partnerships with management organizations and other partners and significant vendors to support delivery of chartered school design and academic program
- A safe, clean and appropriately resourced educational facility with all appropriate services specified in charter and mandated by appropriate law and regulations

Evidence for a financially sound, viable organization may include, but not be limited to, the following:

- School budget, P&Ls, and monthly/quarterly cash-flow reports
- Appropriate insurance documents
- Required facility documents (lease, certificate of occupancy, fire and safety inspections, etc.)
- Financial audits
- Financial leader(s) resume and accountability documents
- Operational policies and procedures
- Operational org chart
- Secure storage areas for student and staff records
- Policies/protocols for maintaining secure records
- School safety plan

### **3. Is the School in Compliance with its Charter and All Applicable Law and Regulations?**

#### **3a. Approved Charter and Agreement**

Schools in substantial compliance with their charter and agreement have:

- Implemented the key features of their charter as described in the original charter and as modified in approved revisions to their charter, including but not limited to mission, academic program, school organization, grade configuration, enrollment, goals, etc.
- Ensure that update-to-date charter is publicly available to staff, parents, and school community
- Implemented comprehensive academic, behavioral, oversight, management, and operational policies and procedures that are substantially aligned with the charter and the school's stated mission and vision

Evidence for a school's compliance with the terms of its charter and charter agreement may include, but not be limited to, the following:

- Authorized charter and signed agreement
- Charter revision request approval and documentation
- School mission
- School policies and procedures
- Site visits
- Board meetings, agendas and minutes
- Leadership/board interviews

#### **3b. Applicable Federal and State Law**

Schools in substantial compliance with federal and state law have:

- Met all legal requirements for Title I and IDEA regulations and reporting
- Comparable enrollment of FRL, ELL and Special Education students to those of their district of location *or* are making documented good faith efforts to reach comparable percentages
- Implemented school policies related to student discipline and promotion and retention that are fully compliant with laws and regulations related to students with disabilities and due process regulations
- Conducted independently verified fair and open lottery and manage with integrity enrollment process and annual waiting lists
- Employed instructional staff with appropriate security clearances and certification requirements

Evidence for compliance with applicable federal and state law may include, but not be limited to, the following:

- School reporting documents
- School's Annual Report
- Student recruitment plan and resources
- Student management policies and promotion and retention policies
- Student discipline records
- Lottery policy, resources, and records; enrollment procedures and records
- Staff roster, fingerprint clearance for all staff, certification status of all instructional staff

### **3c. Applicable Regulations**

Schools in substantial compliance with applicable regulations have:

- Safe and secure facilities with no significant compliance concerns with applicable regulations
- Consistently clean annual audits, up-to-date escrow accounts, and have completed all other financial reporting as required
- Boards that meet requirements for size, meeting frequency, public notice, applicable open-meeting and conflict of interest regulations, as well as complying with NYC DOE CSO's requirements for reporting changes in board membership and securing approval for new board members.
- Informed NYCDOE CSO, and where required, received CSO approval for changes in significant partnerships, such as dropping/replacing a management organization
- Effectively engaged parent associations

Evidence for compliance with applicable regulations may include, but not be limited to, the following:

- School or building safety plan; appropriate inspection documents
- Annual audits, escrow accounts, other financial reporting documents
- Board roster, calendar, agenda and minutes, conflict of interest documents, notification of changes/approval of new member request documents
- Charter revision requests, revised or new contracts
- Parent association calendar of meetings, identified officers, parent association agenda and minutes, parent satisfaction survey results
- Interviews

## **4. What Are the School's Plans for its Next Charter Term?**

### **4a. School Expansion or Model Replication**

In anticipation of a new charter term schools may be considering various growth options: replication, expansion to new grades or increased enrollment or altering their model in some significant way. Successful schools generally have processes for:

- Conducting needs/opportunity assessments
- Forming Board and leadership committees or subcommittees to investigate options, develop action plans, ensure capacity and resources are aligned, etc.
- Engaging school community in articulating charter revisions (or a new charter in cases of replication) to address the proposed growth plans
- Ensuring that the final proposal is ambitious but realistic in its plans
- Creating a well-reasoned and documented prospective for the school's new charter term and, if applicable, a new charter proposal (for replication)

Evidence for likely success in planning for school growth in a new charter term may include, but not be limited to, the following:

- Application Part I: Retroactive Analysis, including performance results and analyses of the current charter term
- Application Part II: Prospective Analysis, including mission, program description, governance, organization, budget, etc. for new term
- Leadership and Board interviews

#### **4b. Organizational Sustainability**

Successful schools consistently perform despite change. While there is no single path for ensuring sustainability, successful schools often have the following features:

- School anticipates organizational opportunities/needs and plans for resource development (human resource policies for growing your own talent, for example, or fundraising or budget management to take care of anticipated capital needs and to mitigate risks for the unexpected, or board development to bring new talent or specific needs-based expertise to the school)

Evidence for organizational sustainability may include, but not be limited to, the following:

- Board roster and resumes
- Board committees and minutes
- School organization chart
- Staff rosters
- Staff handbook
- Leadership and staff interviews
- Budget

#### **4c. School or Model Improvements**

Successful schools are thoughtful about the continued appropriateness of school design features and elements of their models. They:

- Review performance carefully and even if they don't make major changes through expansion or replication, they are careful to adjust elements to ensure continued and improved success.
- Develop plans to improve the school learning environment, including improving their facilities to expand program offerings and/or developing new partnerships to further the school's mission.

Evidence for successful improvements to a school's program or model may include, but not be limited to, the following:

- Application Part I: Retroactive Analysis, including performance results and analyses of the current charter term
- Application Part II: Prospective Analysis, including mission, program description, governance, organization, budget, etc. for new term
- Leadership and board interviews
- MOUs or contracts with partners