



**Consolidated Annual Report to the Massachusetts  
Department of Elementary and Secondary Education  
School Year 2014-2015**

**Brooke Charter School Roslindale**

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## INTRODUCTION TO THE SCHOOLS

<i>Brooke Charter Schools</i>			
<b>Type of Charter</b>	Brooke Roslindale: Commonwealth Brooke Mattapan: Commonwealth Brooke East Boston: Commonwealth	<b>Location</b>	Brooke Charter School Roslindale 190 Cummins Highway Boston, MA 02131  Brooke Charter School Mattapan 150 American Legion Highway Boston, MA 02124  Brooke Charter School East Boston 94 Horace Street Boston, MA 02128
<b>Regional or Non-Regional?</b>	Brooke Roslindale: Non-Regional Brooke Mattapan: Non-Regional Brooke East Boston: Regional	<b>Districts in Region</b>	Brooke Roslindale: N/A Brooke Mattapan: N/A Brooke East Boston: Chelsea & Boston
<b>Year Opened</b>	Brooke Roslindale: 2002 Brooke Mattapan: 2011 Brooke East Boston: 2012	<b>Year(s) Renewed</b>	Brooke Roslindale: 2007 & 2012 Brooke Mattapan: N/A Brooke East Boston: N/A
<b>Maximum Enrollment</b>	Brooke Roslindale: 510 Brooke Mattapan: 510 Brooke East Boston: 510	<b>Current Enrollment</b>	Brooke Roslindale: 504 Brooke Mattapan: 454 Brooke East Boston: 389
<b>Chartered Grade Span</b>	Brooke Roslindale: K-8 Brooke Mattapan: K-8 Brooke East Boston: K-8	<b>Students on Waitlist</b>	Brooke Roslindale: 2199 Brooke Mattapan: 1898 Brooke East Boston: 1349
<b># of Instructional Days during the 2014-2015 school year</b>	Brooke Roslindale: 184 Brooke Mattapan: 184 Brooke East Boston: 184	<b>Current Grade Span (SY 14-15)</b>	Brooke Roslindale: K-8 Brooke Mattapan: K-8 Brooke East Boston: K,1,2,3,5,6,7
<b>School Hours</b>	Brooke Roslindale: 7:45 a.m. – 4:00 p.m. Brooke Mattapan: 7:45 a.m. – 4:30 p.m. Brooke East Boston: 7:45 a.m. – 4:30 p.m. (Except Wednesdays: 7:45 a.m. – 12:30 p.m. at all schools)		
<b>Mission Statement:</b> The mission of Brooke Charter Schools is to provide an academically rigorous public education to students from the cities of Boston and Chelsea that will ensure that they are prepared to enter into and succeed in college.			

## SCHOOL PERFORMANCE & PROGRAM IMPLEMENTATION

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### FAITHFULNESS TO CHARTER

#### Mission and Key Design Elements

##### **Mission Statement**

The mission of Brooke Charter Schools is to provide an academically rigorous public education to students from the city of Boston and Chelsea that will ensure they are prepared enter into and succeed in college.

##### **Governance Model**

Under the Brooke Charter Schools' organizational structure, the Network Co-Directors are the official heads of school. The Network Co-Director for Academics is responsible for developing and evaluating the school principal. This arrangement has helped generate exceptionally strong principal leadership. Assistant principals help ensure that each principal has the time and capacity to deliver intensive feedback and support to each direct report.

The Director of Operations is responsible for all domains that fall outside of the academic program. The Director of Operations reports directly to the principal, but the Network Co-Director for Operations is responsible for training and supporting the Director of Operations.

The Brooke Board of Trustees has maintained a sharp focus on the roles of governance vs. management. The Board uses its committee structure to research and make strong decisions relative to governance (charter amendments, Co-Director reviews, new board member recruitment), fiduciary responsibility (budgets that ensure a strong financial position, strong annual audits), and development.

From 2011 to 2013, the board utilized the Race-To-The-Top evaluation procedures dictated by the Commonwealth's Race to The Top Application to evaluate the Co-Directors of the School. During the 2014-15 school year, the board returned to a review process dictated by the board, including interviews with all direct reports to both Co-Directors, thereby allowing the board to provide more targeted and constructive feedback to the Co-Directors.

The Board's Finance Committee in 2014-2015 developed and approved an annual budget that continues the trend of controlled spending and conservatively projected revenues, thereby ensuring a strong financial position for the schools.

##### **Vision, Beliefs, and Values**

We believe that the achievement gap is the shame of our nation – and that great teaching can close it. Our vision is shaped not only by what we believe, but also by

what research has proven. Research tells us that the number one predictor of student achievement isn't race. It isn't socio-economic status. It's teacher quality. In other words, the best lever that we have to help low-income and minority students succeed in college is the same one that is most effective in helping all students achieve, regardless of their backgrounds: quality teaching in bigger doses. Therefore, our approach is guided by the following questions:

- a. What does research tell us about what quality teaching looks like?
- b. How can we best develop our teachers to ensure that they can deliver this quality teaching to our students?
- c. How can we create the conditions across the school community that support quality teaching?

We believe that it is at the school level where the most necessary and powerful contributions to this effort must be made. It is only at the school level that we can fundamentally transform the daily experience of what it means to teach, by:

- Building orderly and highly functional learning and working environments where teachers work tremendously hard but are simultaneously supported by strong school-wide operations and systems.
- Creating a robust culture of professional development, based on clear standards of excellent teaching, providing teachers with frequent and multiple opportunities to receive feedback on their practice and structured opportunities to reflect upon and develop their practice.
- Building team-based instructional cultures, where teacher teams co-plan units and lessons, analyze data from regular interim assessments, and identify/research/tackle instructional challenges.
- Developing structures that allow teachers to develop strong relationships with students and their families and allow teachers to provide students with immediate targeted feedback.

We believe that by investing in these practices and conditions at the school level, we give ourselves the best opportunity to truly transform the teaching profession and, in so doing, close the achievement gap.

### **Curricular Model, Educational Program, & Whole School Design**

The founding team of Brooke Charter Schools laid out a vision and a plan for ensuring that the schools can deliver great teaching to all students. That teaching is defined by four central components: (1) instilling a growth mindset in our students, (2) focusing on deep conceptual understanding, (3) providing individualized feedback to students, and (4) focusing on strong teacher leadership and strong teacher-student relationships.

**Growth Mindset:** The most visible element of our work to instill a growth mindset to our students is our character education curriculum. Students in grades 3-8 participate in weekly character education lessons where the focus is frequently on how and why

students can grow their intelligence and improve their ability to succeed in school. However, our success in this area is dependent on the extent to which our teachers believe in the validity and power of a growth mindset and communicate that belief throughout their regular interactions with their students and families. That's why we have teaching standards that emphasize the importance of communicating the importance of a growth mindset and that's why our student surveys that we administer each year are structured to help us understand how well our teachers are able to instill a growth mindset in their students.

**Conceptual Understanding:** Our rigorous teaching standards, learning standards, and interim assessments have helped us set the bar very high for student achievement. It is not enough that our students learn facts and procedures. Our interim assessments require that students read, understand, and interpret difficult texts, solve difficult applied mathematical problems, and write cogently and persuasively.

Over the last few years, our academic team has worked to spell out even more clearly what an excellent lesson looks like in math, reading, writing, and science. For each of those areas, that team has drafted a document entitled "Elements of an Effective Lesson", which we use to help articulate and describe the most important elements of a challenging lessons that requires students to think conceptually.

**Individualized Feedback:** At each grade level, we have put in place structures that will provide teachers with small total student loads and the capacity (as well as the expectation) to deliver individualized feedback to students.

- In grades K-2, we have limited class size to 15 and have worked with teachers to help them conference with their students in a way that is both efficient and effective.
- In grades 3 and 4, class size can go up to 20 students in a class, but students take science from a specialist teacher, splitting up classes in the process such that teachers can deliver individualized conferencing to smaller groups of students.
- For students in grades 5-8, we have typically created a semi-self-contained structure in which two teachers take responsibility for one class of students (one teaching math/science, the other teaching English/social studies). During silent reading periods and independent work periods each day, both teachers are present to work with students one-on-one or in small groups on whatever they may need help with.

**Teacher Leadership and Teacher-Student Relationships:** Across all grade levels, new and returning teachers engage in extensive professional development to ensure that they can be strong leaders in the classroom for their kids. Before the school-year starts, teachers lay out their vision for what their classroom should look and feel like, how things should work, and how they will communicate and develop that vision with their students. Throughout the first weeks of the school year, teachers receive extensive and frequent feedback from their principals on how well they are executing those plans. In

addition, teachers capitalize on the small total student loads to get to know students and their families and to engage their students on issues of personal and character development. Teachers who have done an exceptionally good job in this regard are frequently highlighted as models during staff professional development.

**Plans for 2015-2016:** Brooke is in the midst of making some significant changes at the network level, which we believe are further improving the quality of instruction at all three Brooke schools. This year, for the first time, and in response to strong survey responses from teachers, our Co-Director of Academics has developed and delivered math unit plans to teacher teams across the network in grades K-5. The feedback in teacher focus groups has been extremely positive, and overall results on interim tests have sharply improved. In 2015-16, we are adding 3 network staff positions to further develop the quality of instruction across all three Brooke schools: an ELA coordinator, a science coordinator, and a computer science coordinator.

### Evidence of Successful Implementation

- **Culture audits** – Across all 3 Brooke schools, we continued to carry out “culture audits” during the 2014-15 school year, in which a 3<sup>rd</sup> party conducted monthly in-depth audits of the operational state of each Brooke school, according to an evaluation tool and rubric developed by Brooke operations staff.
- **Professional Development** - Across all 3 Brooke schools, principals made and fulfilled a commitment to teachers during the 2014-15 school year to ensure that teachers were observed (with a follow-up meeting) at least 20 times and video-taped in the classroom at least 10 times.
- **Year-End Teacher Surveys** – Across all 3 Brooke schools, year-end teacher surveys showed broad teacher endorsement of school culture. The responses to two key questions are shown below. The scores represent the percent of teachers who “Agree” or “Strongly Agree” with the statement.

Statement	Brooke Roslindale	Brooke Mattapan	Brooke East Boston
Teachers at my school share a common vision of what effective teaching looks like.	80%	78%	88%
I know what is expected of me in order to be successful at work.	94%	88%	90%

- **Minimizing total student load** – Across all 3 Brooke schools, the total student load carried by classroom teachers was 28 students or less. By minimizing total student load (the total number of students for whom the teacher is responsible for teaching) we are able to realize our vision by providing the conditions under which teachers can develop strong relationship with students and their families and provide targeted individualized feedback to each of their students.

## Amendments to Charter

Date	Amendment Requested	Approved?
7/31/15	Charter Consolidation & Expansion Request	Pending

## Dissemination Efforts

As part of the school's faithfulness to charter efforts, and in alignment with the DESE Charter School Performance Criteria, Brooke Charter Schools have taken the following actions with regard to dissemination and providing innovative models for replication and best practices to other public schools in the City of Boston and beyond the district.

In order to share our work on developing effective teaching, we have significantly increased the materials and resources available to other schools and districts on the Brooke website. Those include but are not limited to:

- A complete list of our K-8 learning standards
- Our standards of excellent teaching and an accompanying rubric
- Our standards of instructional leadership
- Our character education standards
- An instructional resources pages including an array of sample unit and lesson plans
- A How We Teach section laying out in detail the Brooke approach to teacher professional development

Brooke consistently assesses the augmentation of materials and documentation available to the general public via the website and upon request. Brooke has taken steps to make available the most commonly requested information including additional details on teacher professional development, the associate teacher program, and an expanded library of online instructional.

Brooke is currently engaged in a major institutional priority to codify and disseminate the components of our success (for example, the essential elements of an effective lesson, a clear guide for classroom leadership, skill progressions for new teachers, and an outline of our associate teacher program). A key element of this plan is the development of a comprehensive video library that will provide examples of these components in action.

The video library will help document methods of effective classroom instruction, management, and culture, for the purpose of disseminating best practices, as well as developing and supporting teachers internally. The video library will assist principals with supporting new and veteran teachers across all-grade levels and would work to contextualize and illustrate Brooke's standards. For example, Brooke plans to document evidence of what the school's highest performing teachers do to positively set-up classroom culture at the beginning of the year, and document lessons related to

various elements of effective instruction. Principals could utilize the video library as a key resource for new teacher orientations as well as ongoing professional development, as a tool to support struggling teachers, and to coach high-performing teachers through ongoing reflection and discussion.

In order to support greater partnerships with Boston Public Schools and students' positive reading habits, Brooke Charter Schools along with the Eliot K-8 Innovation School and the Orchard Gardens K-8 Pilot School partnered in 2015 to organize a joint book club that pairs students from both schools with adults who love to read. Participation involves reading a great book on your own time and the opportunity to discuss with a small group of enthusiastic student readers over dinner. The partnership began with Brooke Roslindale and East Boston, but there are plans to expand to Brooke Mattapan as well.

In addition, Brooke Charter Schools has embarked on an ambitious initiative to offer computer science instruction for all students in grades K through 8. A sequence of age-appropriate activities will be put in place to help students build digital literacy, contextual knowledge, and computer programming skills from one year to the next. All activities will be aligned with the Massachusetts technology literacy standards (Massachusetts Department of Elementary and Secondary Education, 2008), as well as the national standards promulgated by the Computer Science Teachers Association (CSTA, 2011), and will be made publicly available for use by any district, charter, or private school.

In the 2014-2015 school year, Brooke Charter Schools hosted 181 visits representing 54 organizations (across all three campuses).

The founding group of Midtown Charter Public School (MCPS) in Mississippi visited Brooke in 2014. Following their visit, they asked for permission to model their school along the lines of Brooke and for our help providing materials that would assist in their planning. In 2015, the founding principal of MCPS, Adam Mangana, traveled to Brooke for a 3-week residency to prepare for opening in August 2015.

Charter School Growth Fund has identified Brooke as among the highest performing charter networks in its national portfolio. Through our relationship with Charter School Growth Fund, we have had over 25 visits to Brooke from charter networks from across the country.

Organizations hosted by Brooke in 2014-2015 include the following: Achievement First; Alma Del Mar Charter School; BELL; Blackstone Valley Prep; Boston Bridge Charter School; BPS School Leaders; Breakthrough; Building Excellent Schools; Charter School COOs; Citizen Schools; City Year Boston; Coney Island Prep; DESE; Education Pioneers; EdVestors; ELL Site Visit; Excel Academies; Explore Charter Schools; FirstLine Schools; Generation Teach; Glenwood Leadership Academy; Harvard Graduate School of Education; House of Blues Foundation; Houston ISD; KaBOOM!; Kaufmann School; KIPP;

KIPP Austin; KIPP Nashville; KIPP New Jersey; Lawrence Public Schools; Leading Educators; Martin Luther King Jr. Charter; Mass Insight; Match; Match Teacher Residency; Missouri Charter Group; Mott Haven Academy; New Beginnings Charter Schools; Orchard Gardens Pilot School; Paul Cuffee School; PAVE Academy; Pozen Prize Committee; ReNEW Schools; RePublic Schools; River Charter; Rocky Mountain Prep; Roots Academy; Salem Public Schools; Schools That Can; Sloan MIT; Smith Family Foundation; St. John's Catholic School; Teach For America MA; Teach For American RI; TEAM Schools; The Boston Foundation; Transforming Education; Trotter Elementary; UP Central Office; UP Dorchester; UP Holland; UP Oliver; UpStart Education; Veritas Prep; Vision Prep Charter; Wallin Elementary; Washington State Charter School Assoc.; Watertown Public Schools; and WGBH.

We have also shared all of our curriculum resources (unit plans, lesson plans, etc.) with any school who has requested them across the state and country.

## ACADEMIC PROGRAM SUCCESS

### Student Performance: MCAS

Overall achievement of Brooke students was strong at all three Brooke schools on the 2014 MCAS, with Brooke students earning six first-place state-wide rankings for proficiency and five first-place state-wide rankings for advanced. A few highlights include the following:

- 86% of Brooke Roslindale 5<sup>th</sup> Graders scored at the advanced level in math. This is the highest percentage of 5<sup>th</sup> Graders scoring advanced on the math MCAS in the history of the test.
- Brooke Mattapan 7<sup>th</sup> Graders had the highest percentage of students scoring proficient and the 5<sup>th</sup> highest percentage of students scoring advanced on the ELA test of any school in the state.
- 91% of Brooke East Boston 6<sup>th</sup> Graders scored at the advanced level in math. This is the highest percent of 6<sup>th</sup> Grade students scoring advanced on the math MCAS in the last nine years.

### Student Performance – 2014 Report Card - Brooke Charter School Roslindale

<http://profiles.doe.mass.edu/reportcard/rc.aspx?linkid=37&orgcode=04280305&fycode=2014&orgtypecode=6&>

### Student Performance – 2014 Report Card - Brooke Charter School Mattapan

<http://profiles.doe.mass.edu/reportcard/rc.aspx?linkid=37&orgcode=04430205&fycode=2014&orgtypecode=6&>

### Student Performance – 2014 Report Card - Brooke Charter School East Boston

<http://profiles.doe.mass.edu/reportcard/rc.aspx?linkid=37&orgcode=04570205&fycode=2014&orgtypecode=6&>

### Student Performance: Non-MCAS

Brooke has a network-wide interim assessment system in mathematics, reading, writing, science, and social studies. Those interim assessments are administered on a rotating basis (one in each subject area approximately every 8 weeks). Teachers are provided with network data on the day following those assessments. The interim assessments are aligned with the Massachusetts Curriculum Frameworks and the Common Core. The results are intended to be used on a formative basis throughout the year, not as a summative measure of achievement (we view MCAS and PARCC as our summative measures). In addition, please See Appendix A, the Accountability Plan Evidence 2014-2015, for measures pertaining to student performance.

## Program Delivery: General Information

### Curriculum

The Brooke curriculum is defined by a set of rigorous learning standards and accompanying interim assessments. Teachers have the autonomy to create or adopt their own lesson plans and curricular materials and are accountable for ensuring that students are able to meet our learning standards. At the end of each school year, teachers provide input to the principal on how the learning standards could be revised or improved. We generally do not modify the curriculum to meet the needs of students, but rather modify the extent to which we deliver individualized support to students who most need that help and support to meet the standards.

During the 2014-15 school year, at the request of a strong majority of teachers, we piloted a project in which our Co-Director for Academics drafted mathematics unit plans for grades K-5. Teacher teams then translated those unit plans into daily lesson plans. The feedback from teachers has been positive and student achievement has increased significantly in mathematics in those grades. Consequently, we are exploring ways to deliver similar kinds of support to teachers in other subject areas (more on that in the section on the next five years).

### Instruction

Our principals serve as our instructional leaders and are responsible for coordinating and delivering organized group professional development activities as well as ensuring that teachers receive intensive and regular individualized feedback on their teaching performance. For both of those areas, our standards of excellent teaching and accompanying rubric lay out clearly what we think great teaching looks like. Principals use those standards to deliver individualized feedback to teachers (based on weekly observations) and to inform the organized weekly professional development meetings on Wednesday afternoons. Principals also meet regularly with teacher teams to review the data for interim network assessments and to make plans for continued student improvement.

### Assessment and Program Evaluation

In addition to employee performance reviews, there are several measures that we use to regularly assess the effectiveness of our work and to target areas for improvement. Those include:

- Interim assessments – Results of each assessment are reviewed by principals with teacher teams in order to identify areas for continued improvement
- STEP assessments – Results are used to monitor the effectiveness of teachers in helping students in grades K-3 learn to read and to monitor the success of overall approach to teaching reading in the early elementary grades
- Building audits – Conducted each month to assess the extent to which our school buildings are clean, organized, and high-functioning environments. Our

Directors of Operations use the results to target areas of improvement for building operations.

- Student surveys – Teachers use the results to improve their own practice and principals use the results to evaluate potential target areas for professional development. Student survey results are not used for formal teacher evaluation purposes.
- Staff survey results – Lengthy staff surveys are administered at mid-year in order to get feedback and identify areas of improvement for school administrators. Operations leaders also deliver shorter teacher surveys throughout the year and conduct teacher focus groups to get feedback on how to make our schools more supportive places for teachers.
- Parent survey results – Parent survey results are collected by operations leaders at the end of each school-year and are compared to historical parent survey results in order to gauge the level of current parent satisfaction with the school.

### Program Delivery: Support for Diverse Learners

We meet the needs of all students through a universal design that allows us to provide differentiated instruction (an essential element of great teaching). Our school day allows our staff ample time for differentiation so that all students receive support on their own instructional level. We employ reading and writing workshop models because this conferencing format lets teachers meet with individual students and allows students to work at their own level and pace. Our math approach provides students with independent work time, during which time teachers work with individuals or groups of students to differentiate instruction. Additionally, the presence of Associate Teachers allows classroom teachers to focus on small groups of struggling students while the Associate leads the general class. Our network Director of Student Support bears responsibility for ensuring compliance with special education and ELL laws across the schools.

English language learners at Brooke receive two types of English language development support. *Direct ESL instruction* is delivered by a licensed ESL teacher and is provided both in and out of the general education classroom. The ELL Coordinator, principal and director of student support create individualized schedules for each ELL to ensure the direct ESL instruction is delivered during the most appropriate time and setting. *Sheltered Content Instruction* is provided by a general education teacher who holds a MA DESE Sheltered Content Instruction Endorsement or holds an ESL license. We strive to have all ELLs reclassified within three years at our school. We consider reclassifying ELLs when they have earned an overall composite score on ACCESS of at least a 5 with reading and writing scores at least a 4.0 and are able to demonstrate the ability to perform ordinary class work in English. We review data from STEP reading assessments, network assessments and report cards which shows mastery towards grade level standards when considering reclassifying students. Teacher input is also an important part of the reclassification process.

Brooke offers a full continuum of services to meet the needs of students on IEPs. Within our network, we currently employ two full-time speech and language therapists, three school psychologists, and an occupational therapist and have contracted with physical therapist, Board Certified Behavioral Analyst and educational audiologist. While it is our hope that all students are fully included in the general education setting as quickly and as much as possible we realize this is not always possible or appropriate. All services are provided in the least restrictive environment (usually the classroom, but a range of options will be provided as needed).

In 2013-14, a DESE site visit team conducted visits at all three Brooke Charter Schools, and provided the following finding with regard to Brooke's "Supports for Diverse Learners."

Key Indicators	Mattapan	E. Boston	Roslindale
<p><b><i>Supports for Diverse Learners</i></b>            The school provides supports to meet the academic needs for all students, including but not limited to students with disabilities and English language learners.</p>	Meets	Partially Meets	Meets

## ORGANIZATIONAL VIABILITY

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### ORGANIZATIONAL VIABILITY: CHARTER SCHOOL PERFORMANCE CRITERIA

#### Organizational Structure of the School

No changes were made to the school-based organizational structure during the 2014-2015 school year. There are no changes anticipated for the coming year.

#### Network Structure

No changes were made to the network organizational structure during the 2014-2015 school year. As noted in the School Performance section of this Annual Report, in 2015-2016, we are adding 3 network staff positions to further develop the quality of instruction across all three Brooke schools: an ELA coordinator, a science coordinator, and a computer science coordinator.

#### Board Oversight

At open and publicized meetings, the network Co-Directors present on the academic success and organizational viability of each school in the network and of the network as a whole. The Co-Directors present performance data encompassing the same performance metrics at each school, including:

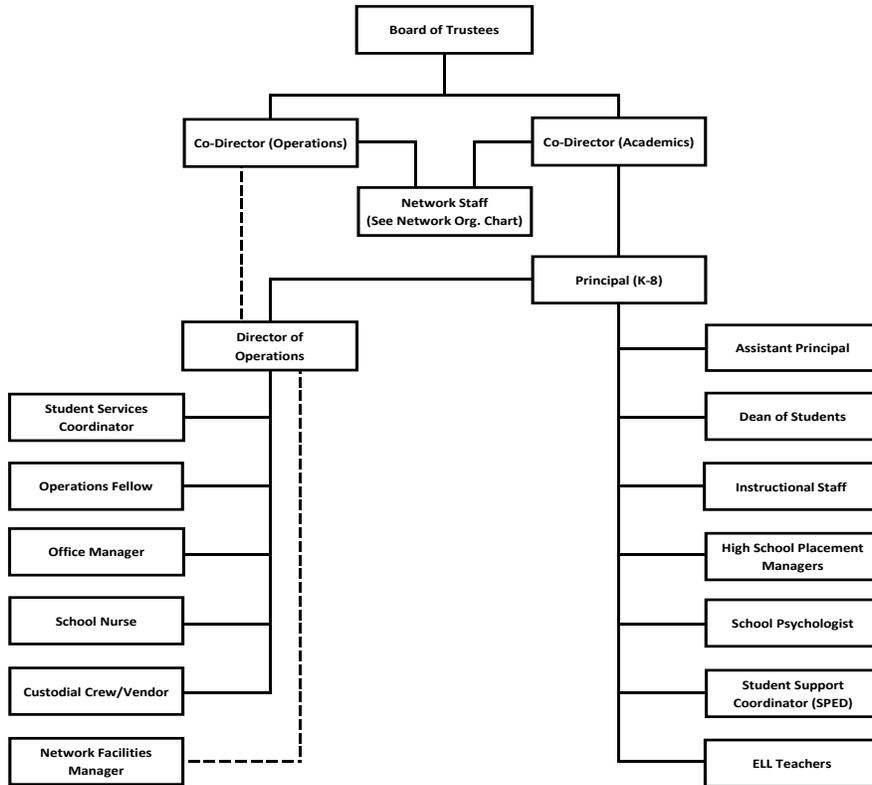
- Student performance on MCAS, network-wide interim assessments, and STEP tests in grades K-2
- Quarterly financial reports showing projected vs. actual expenditures
- Annual audits
- Recruitment and enrollment data, including the enrollment rates of targeted demographic sub-groups
- Student retention and attrition data.

Discussion and analysis of this data is accompanied by a narrative performance update at each school, presented by the network Co-Directors or the principal(s). The board evaluates the extent to which each school as an individual entity has met performance targets to ensure that all schools consistently deliver the same high-quality educational service to students and their families.

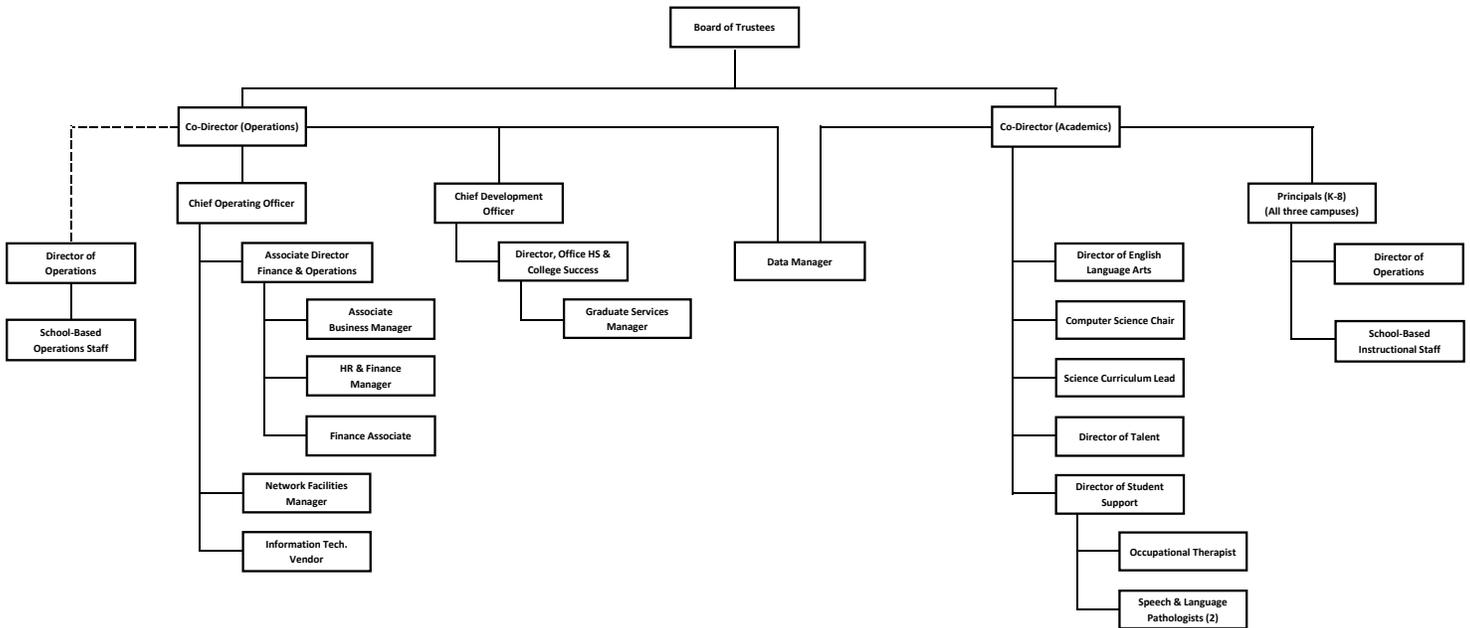
See the "Governance Model" section under Faithfulness to Charter: Mission and Key Design Elements for information regarding how the board is overseeing and ensuring the success of all network schools.

Organizational Charts

Brooke Charter Schools  
School-Based Organizational Chart



Brooke Charter Schools  
Network Organizational Chart



## Teacher Evaluation

Teachers are evaluated by their principals according to the Brooke standards of excellent teaching and the accompanying rubric (<http://www.ebrooke.org/great-teaching/understanding-great-teaching/>). Principals observe teachers at least every other week and use their findings from those observations to inform their evaluations of their teachers. At mid-year, principals complete a teacher evaluation for each teacher and each teacher completes a self-evaluation. Principals and teachers exchange those evaluations 24 hours in advance of their mid-year meetings to discuss the evaluations.

**BUDGET AND FINANCE REPORTS****Income Statement (FY 15 Unaudited)****Brooke Charter Schools: PROFIT & LOSS**

July 1, 2014 through June 30, 2015

	Brooke Roslindale 1-Jul-14 30-Jun-15	Brooke Mattapan 1-Jul-14 30-Jun-15	Brooke East Boston 1-Jul-14 30-Jun-15	Brooke Foundation 1-Jul-14 30-Jun-15
<b>Ordinary Income/Expense</b>				
<b>Income</b>				
Private Grants & Donations	\$ 1,764	\$ 126,630	\$ 221,500	\$ 913,212
Federal Entitlements	\$ 441,726	\$ 427,306	\$ 260,599	\$ -
Commonwealth Per Pupil Revenue	\$ 7,541,010	\$ 6,907,081	\$ 5,685,051	\$ -
Nutrition Program	\$ 274,765	\$ 262,527	\$ 215,549	\$ -
Misc. Income	\$ 796,728	\$ 835,988	\$ 503,329	\$ -
<b>Investment Income</b>	\$ -	\$ -	\$ -	\$ 1,250
<b>Private Donations</b>				
Alumni Support Donations	\$ -	\$ -	\$ -	\$ 14,475
Misc. Donations	\$ -	\$ -	\$ -	\$ 605
High School Scholarship Funds	\$ -	\$ -	\$ -	\$ 78,135
Unrestricted Donations	\$ -	\$ -	\$ -	\$ 391,080
Private Donations - Other	\$ -	\$ -	\$ -	\$ 2,550
<b>Total Private Donations</b>	\$ -	\$ -	\$ -	\$ 486,845
<b>Total Income</b>	\$ 9,055,994	\$ 8,559,532	\$ 6,886,028	\$ 1,401,306
<b>Expense</b>				
Payroll & Benefit Expenses	\$ 4,201,247	\$ 3,691,935	\$ 3,135,158	\$ -
Instructional Expenses	\$ 271,844	\$ 328,949	\$ 333,229	\$ -
Student Services	\$ 1,261,543	\$ 1,163,419	\$ 909,079	\$ -
Facility Expenses	\$ 365,654	\$ 1,622,252	\$ 386,601	\$ -
Operating Expenses	\$ 964,783	\$ 349,598	\$ 283,201	\$ 19,299
Network Expenses	\$ 1,477,102	\$ 255,166	\$ 1,211,822	\$ -
<b>Alumni Support Programs</b>				
Alumni Book Stipends	\$ -	\$ -	\$ -	\$ 8,950
Alumni Scholarships	\$ -	\$ -	\$ -	\$ 18,425
Alumni Support Programs - Other	\$ -	\$ -	\$ -	\$ 100
<b>Total Alumni Support Programs</b>	\$ -	\$ -	\$ -	\$ 27,475
<b>Grant Expense</b>	\$ -	\$ -	\$ -	\$ 863,212
<b>Total Expense</b>	\$ 8,542,174	\$ 7,411,319	\$ 6,259,090	\$ 909,986
<b>Net Ordinary Income</b>	\$ 513,820	\$ 1,148,213	\$ 626,938	\$ 491,320
<b>Other Income/Expense</b>				
<b>Other Income</b>				
<b>Network Income</b>	\$ 6,268,598	\$ -	\$ -	\$ -
<b>Interest Income</b>				
Interest Income - B1 Notes	\$ -	\$ -	\$ -	\$ 499,313
Interest Income - Bond Ammort.	\$ -	\$ -	\$ -	\$ 369,485
Interest Income - BSC Note	\$ -	\$ -	\$ -	\$ 1,767
Interest Income - IRS Subsidy	\$ -	\$ -	\$ -	\$ 984,191
Interest Income - Other	\$ -	\$ -	\$ -	\$ 94
<b>Total Interest Income</b>	\$ -	\$ -	\$ -	\$ 1,854,850
<b>Total Other Income</b>	\$ 6,268,598	\$ -	\$ -	\$ 1,854,850
<b>Other Expense</b>				
Financing Fees	\$ -	\$ -	\$ -	\$ 38,485
Interest Expense	\$ -	\$ -	\$ -	\$ 665,987
Interest - QLICI Loan	\$ 13,921	\$ -	\$ -	\$ -
Bond Discount Amortization Exp	\$ 369,485	\$ -	\$ -	\$ -
150 ALH Condo Expenses	\$ 38,245	\$ -	\$ -	\$ -
Network Payroll & Benefits	\$ 1,749,049	\$ -	\$ -	\$ -
Network Student Services	\$ 44,731	\$ -	\$ -	\$ -
Network Facilities	\$ 2,017,168	\$ -	\$ -	\$ -
Network Operating	\$ 679,175	\$ -	\$ -	\$ -
Operating/Capital Reserve Proj	\$ 131,200	\$ 65,873	\$ 60,593	\$ -
<b>Total Other Expense</b>	\$ 5,042,974	\$ 65,873	\$ 60,593	\$ 704,473
<b>Net Other Income</b>	\$ 1,225,624	\$ (65,873)	\$ (60,593)	\$ 1,150,377
<b>Net Income</b>	\$ 1,739,444	\$ 1,082,340	\$ 566,344	\$ 1,641,697

## Statement of Net Assets – Balance Sheet (FY 15 Unaudited)

## Brooke Charter Schools - BALANCE SHEET

As of June 30, 2015

	Brooke Roslindale 30-Jun-15	Brooke Mattapan 30-Jun-15	Brooke East Boston 30-Jun-15	Brooke Foundation 30-Jun-15
<b>ASSETS</b>				
<b>Current Assets</b>				
<b>Checking/Savings</b>				
Operating Bank Accounts				
Total Operating Acct	\$ 6,697,655	\$ 3,967,565	\$ 2,702,270	\$ 1,711,077
Other Bank Accounts				
Total Operating Acct	\$ 41,377	\$ -	\$ -	\$ 84
150 ALH Construction Accts				
Total 150 ALH Construction Accts	\$ 441,243	\$ -	\$ -	\$ -
94 Horace St Construction Accts				
Total 94 Horace St Construction Accts	\$ 263,205	\$ -	\$ -	\$ -
<b>Total Checking/Savings</b>	<b>\$ 7,443,480</b>	<b>\$ 3,967,565</b>	<b>\$ 2,702,270</b>	<b>\$ 1,711,161</b>
<b>Total Other Current Assets</b>	<b>\$ 17,270,080</b>	<b>\$ 76,021</b>	<b>\$ 60,169</b>	<b>\$ 462,410</b>
<b>Total Current Assets</b>	<b>\$ 24,713,559</b>	<b>\$ 4,043,586</b>	<b>\$ 2,762,439</b>	<b>\$ 2,173,570</b>
<b>Fixed Assets</b>				
Fixed Assets				
Total Fixed Assets	\$ 28,814,349	\$ 234,351	\$ 193,454	\$ -
Total Accumulated Depreciation	\$ (3,011,245)	\$ (142,240)	\$ (88,037)	\$ -
<b>Total Fixed Assets</b>	<b>\$ 25,803,104</b>	<b>\$ 92,112</b>	<b>\$ 105,417</b>	<b>\$ -</b>
<b>Other Assets</b>				
BCS Intercompany (Due To/From)				
Total BCS Intercompany (Due To/From)	\$ 3,373,991	\$ -	\$ -	\$ -
<b>Total Other Assets</b>	<b>\$ 3,373,991</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ 28,282,940</b>
<b>TOTAL ASSETS</b>	<b>\$ 53,890,654</b>	<b>\$ 4,135,698</b>	<b>\$ 2,867,856</b>	<b>\$ 30,456,510</b>
<b>LIABILITIES &amp; EQUITY</b>				
<b>Liabilities</b>				
<b>Current Liabilities</b>				
Accounts Payable				
Total Accounts Payable	\$ 54,026	\$ 46,237	\$ 85,402	\$ 5,350
Other Current Liabilities				
Total Accrued Expenses	\$ 280,630	\$ 242,598	\$ 213,589	\$ -
Total Deferred Revenue	\$ -	\$ -	\$ 37,603	\$ 1,961,838
Total BCS Intercompany (Due To/From)	\$ -	\$ 1,585,525	\$ 1,431,977	\$ 318,992
Total Payroll Liabilities	\$ 42,361	\$ 28,520	\$ 23,192	\$ -
Misc. Current LTD Liabilities	\$ -	\$ -	\$ -	\$ 879,519
<b>Total Current Liabilities</b>	<b>\$ 377,017</b>	<b>\$ 1,902,880</b>	<b>\$ 1,791,764</b>	<b>\$ 3,165,699</b>
Long Term Liabilities				
Total Long Term Liabilities	\$ 42,063,848	\$ -	\$ -	\$ 17,831,474
<b>Total Liabilities</b>	<b>\$ 42,440,865</b>	<b>\$ 1,902,880</b>	<b>\$ 1,791,764</b>	<b>\$ 20,997,173</b>
<b>Equity</b>				
Unrestricted Net Assets	\$ -	\$ 1,213,999	\$ -	\$ 313,529
Retained Earnings	\$ 17,358,193	\$ -	\$ 509,747	\$ 8,031,176
Opening Balance Equity	\$ (7,647,848)	\$ -	\$ -	\$ (527,065)
Net Income	\$ 1,739,444	\$ 1,018,819	\$ 566,344	\$ 1,641,697
<b>Total Equity</b>	<b>\$ 11,449,789</b>	<b>\$ 2,232,818</b>	<b>\$ 1,076,092</b>	<b>\$ 9,459,337</b>
<b>TOTAL LIABILITIES &amp; EQUITY</b>	<b>\$ 53,890,654</b>	<b>\$ 4,135,698</b>	<b>\$ 2,867,856</b>	<b>\$ 30,456,510</b>

## Approved School Budget for FY 16

## 2015 - 2016 Brooke Charter Schools Budget Summary

	FY16 Roslindale Budget	FY16 Network Budget	FY16 Mattapan Budget	FY16 East Boston Budget	FY16 Foundation Budget	FY16 BCS Total
<b>Ordinary Income/Expense</b>						
<b>Income</b>						
Private Grants & Donations	500	1,517,039	-	-	1,035,841	2,553,379
Federal Entitlements	437,145	-	435,829	399,787	-	1,272,761
Commonwealth Per Pupil Revenue	6,946,408	-	6,775,268	6,833,560	-	20,555,237
Nutrition Program	269,897	-	316,623	249,645	-	836,165
Misc. Income	106,690	3,000	67,189	81,816	-	258,695
In-Kind Transportation	600,000	-	558,359	452,779	-	1,611,139
Regional Transportation ( <b>B3 Only</b> )	-	-	-	22,304	-	22,304
Discretionary Income	76,500	-	74,400	76,500	-	227,400
Previous Year Surplus Carryover Income	10,451	-	-	144,636	-	155,087
IRS Subsidy Income	-	966,056	-	-	966,056	1,932,111
Interest Income ( <b>Foundation Only</b> )	-	-	-	-	1,747,898	1,747,898
Network Tuition Charges	-	1,547,197	-	-	-	1,547,197
Network Facilities Charges	-	1,440,000	-	-	-	1,440,000
Related Service Providers Charges	-	449,761	-	-	-	449,761
Network Operating/Capital Reserve Income	-	-	-	-	-	-
Rental Income - 7 Elkins St.	-	324,900	-	-	-	324,900
Direct Loan Interest Income	-	938,000	-	-	-	938,000
Leverage Loan Interest Income	-	164,022	-	-	-	164,022
<b>Total Income</b>	<b>8,447,591</b>	<b>7,349,974</b>	<b>8,227,668</b>	<b>8,261,028</b>	<b>3,749,794</b>	<b>36,036,056</b>
<b>Expense</b>						
Payroll and Benefit Expenses	4,471,278	2,547,197	4,180,892	4,261,017	-	15,460,384
Instructional Expenses	302,307	-	423,996	428,233	-	1,154,535
Student Services	561,165	260,750	478,853	605,549	-	1,906,318
In-Kind Transportation	600,000	-	558,359	452,779	-	1,611,139
Facility Expenses	392,146	404,870	1,595,437	414,619	-	2,807,071
Interest Expense	-	3,119,636	-	-	627,090	3,746,726
Operating Expenses	322,599	722,594	329,974	295,201	992,914	2,663,281
Depreciation & Amortization Expenses	723,745	-	36,347	28,599	-	788,691
150 ALH Condo Expense	-	40,540	-	-	-	40,540
Network Tuition Charge	688,641	-	175,200	683,356	-	1,547,197
Network Facilities Charge	720,000	-	-	720,000	-	1,440,000
Related Service Providers Charge	153,674	-	137,069	159,018	-	449,761
Network Operating/Capital Reserves	235,781	254,388	281,888	182,065	-	954,122
Network Expenses (Grant Funded)	-	-	66,000	59,192	-	125,192
<b>Total Expense</b>	<b>9,171,336</b>	<b>7,349,974</b>	<b>8,264,016</b>	<b>8,289,627</b>	<b>1,620,004</b>	<b>34,694,957</b>
<b>Net Income (Accrual Basis)</b>	<b>(723,745)</b>	<b>0</b>	<b>(36,347)</b>	<b>(28,599)</b>	<b>2,129,790</b>	<b>1,341,098</b>
+ Depreciation & Amortization Expenses	723,745	-	36,347	28,599	-	788,691
- Capital Improvement Expenses	-	-	-	-	-	-
+ Network of Operating/Capital Reserve	235,781	254,388	281,888	182,065	-	954,122
- Principal Payments for Debt Service	-	-	-	-	2,054,220	2,054,220
<b>Net Income (Cash Basis)</b>	<b>235,781</b>	<b>254,388</b>	<b>281,888</b>	<b>182,065</b>	<b>75,570</b>	<b>1,029,692</b>

FY 15 Capital Budget (DRAFT)

DESE Annual Report: Brooke Charter Schools - Draft Capital Budget

Fiscal Year	School	Project Description	Project Current Status	Project Est. Completion Date (M-Y)	Project Est. Total Cost Across FY	Project Financing / Funding Source(s)	Project Cap. Reserve Acct. Current FY	Project Non Cap. Res. Funds Current FY
16	Roslindale	Boiler Replacement & Gas Line Installation	Construction	Oct-15	\$ 590,000.00	Capital Reserves	\$ 590,000.00	\$ -
16	Roslindale	Playground Turf Replacement & Fence Installation	Design & Bidding	Oct-15	\$ 150,000.00	Capital Reserves	\$ 150,000.00	\$ -
16	Roslindale	Elevator Installation	Prelim. Architectural Review	Sep-16	\$ 750,000.00	Capital Reserves	\$ 350,000.00	\$ -
16	Mattapan	East Elevation Masonry Repair, Restoration, & Waterproofing	Construction	Aug-15	\$ 266,000.00	Project Funds & Grant	\$ -	\$ 266,000.00
16	East Boston	Masonry Repair, Restoration, & Waterproofing	Construction	Aug-15	\$ 120,000.00	Capital Reserves	\$ 120,000.00	\$ -
<b>TOTAL YEAR 2</b>					<b>\$ 1,876,000.00</b>		<b>\$ 1,210,000.00</b>	<b>\$ 266,000.00</b>

**APPENDIX A: ACCOUNTABILITY PLAN EVIDENCE 2014-2015**

	2014 - 2015 Performance (Met/Not Met)	Evidence/Explanation
<b>Objective:</b> The school is faithful to the mission, vision and educational philosophy defined in the charter application and any subsequent approved amendment(s).		
<b>Measure:</b> 75% of BCS 8 <sup>th</sup> graders will score at the 50 <sup>th</sup> percentile nationally or higher on all 3 sections of the SSAT (verbal, quantitative, and reading).	<b>Brooke Roslindale:</b> Met <b>Brooke Mattapan:</b> Met <b>Brooke East Boston:</b> N/A	Secondary School Admission Test – Summary Score Roster & SSAT Estimated National Percentile Rankings. <b>Brooke Roslindale:</b> 100% scored above 50 <sup>th</sup> national percentile on Quant. & Reading, 88% Verbal. <b>Brooke Mattapan:</b> 100% scored above 50 <sup>th</sup> national percentile on Quant., Reading, & Verbal.
<b>Measure:</b> 75% of BCS 8th graders will gain admission to a selective-admissions high school. <sup>1</sup>	<b>Brooke Roslindale:</b> Met <b>Brooke Mattapan:</b> Met <b>Brooke East Boston:</b> N/A	83% of Brooke Roslindale 8th Graders & 92% of Brooke Mattapan 8th graders were granted admission to selective admissions high schools.
<b>Measure:</b> Students in K2 – 3rd Grade will show improvement of three STEP levels within one academic year.	<b>Brooke Roslindale:</b> Met <b>Brooke Mattapan:</b> Met <b>Brooke East Boston:</b> Met	<b>Brooke Roslindale:</b> Out of 249 K-3 students, 190 grew 3 step levels or maxed out 76% <b>Brooke Mattapan:</b> Out of 243 K-3 students, 208 grew 3 step levels or maxed out 85.6% <b>Brooke East Boston:</b> Out of 252 K-3 students, 168 grew 3 step levels or maxed out 66.7%
<b>Objective:</b> The classroom and school environment is orderly, supports the goal of student understanding and mastery of skills, and is consistent with the school’s mission.		
<b>Measure:</b> Each month, a formal School Audit will be administered at each BCS facility by a network employee using an internally-developed rubric. Audit scores should be above 80% at every facility.	<b>Brooke Roslindale:</b> Met <b>Brooke Mattapan:</b> Met <b>Brooke East Boston:</b> Met	Results confirmed via internally-developed rubric in the audit reports for every month. (See below for annual average scores) <b>Brooke Roslindale:</b> 84% <b>Brooke Mattapan:</b> 90% <b>Brooke East Boston:</b> 82%

<sup>1</sup> “Selective Admissions” is defined here to include parochial schools, independent schools, and/or Boston exam schools, but does not include Boston charter schools or pilot schools.

	2014 - 2015 Performance (Met/Not Met)	Evidence/Explanation
<p><b>Measure:</b> 50% of families will respond to the annual year-end parent survey, and 90% or more of all families will indicate that they are satisfied with the school's behavior standards and expectations for students.</p>	<p><b>Brooke Roslindale:</b> Partially met.  <b>Brooke Mattapan:</b> Partially Met.  <b>Brooke East Boston:</b> Met</p>	<p>Evidence provided via parent survey responses collected at each school.  <b>Brooke Roslindale:</b> 34% response rate<sup>2</sup>, 94% satisfied.  <b>Brooke Mattapan:</b> 47% response rate, 97.7% satisfied.  <b>Brooke East Boston:</b> 63% response rate, 95.7% satisfied.</p>
<p><b>Measure:</b> 50% of families will respond to the annual year-end parent survey, and 80% or more of all families will indicate that the school's behavior standards and expectations for students are better than at their child's previous school.<sup>3</sup></p>	<p><b>Brooke Roslindale:</b> Not Met.  <b>Brooke Mattapan:</b> Partially Met.  <b>Brooke East Boston:</b> Met</p>	<p><b>Brooke Roslindale:</b> 34% response rate, 78% indicate better standards.  <b>Brooke Mattapan:</b> 47% response rate, 95.1% indicate better standards.  <b>Brooke East Boston:</b> 63% response rate, 94.4% indicate better standards.</p>
<p><b>Objective: The school establishes a professional climate resulting in a purposeful learning environment and reasonable rates of retention for school administrators, teachers and staff.</b></p>		
<p><b>Measure:</b> All BCS teachers will be observed at a minimum of 20 times each school year. Observations will be completed by the principal, assistant principal, and/or by peer teachers, and will include feedback and follow-up discussion.</p>	<p><b>Brooke Roslindale:</b> Met  <b>Brooke Mattapan:</b> Met  <b>Brooke East Boston:</b> Met</p>	<p>Evidence provided via observation logs for each school.</p>
<p><b>Measure:</b> BCS will retain 80% of teachers from one school year to the next, excluding those who leave for purposes of geographic re-location.</p>	<p><b>Brooke Roslindale:</b> Met  <b>Brooke Mattapan:</b> Met  <b>Brooke East Boston:</b> Met</p>	<p><b>Brooke Roslindale:</b> 80%  <b>Brooke Mattapan:</b> 82%  <b>Brooke East Boston:</b> 97%</p>

<sup>2</sup> To improve participation next year, Brooke Roslindale will distribute the survey earlier and engage in additional follow up with teachers about collecting the survey from their students.

<sup>3</sup> Survey question is stated as follows: Please compare the behavioral standards and expectations at Brooke Charter Schools to those at your child's previous school (Better, Same, Worse). This applies only to families of children who attended a previous school.

## APPENDIX B: CHARTER SCHOOL RECRUITMENT & RETENTION PLAN

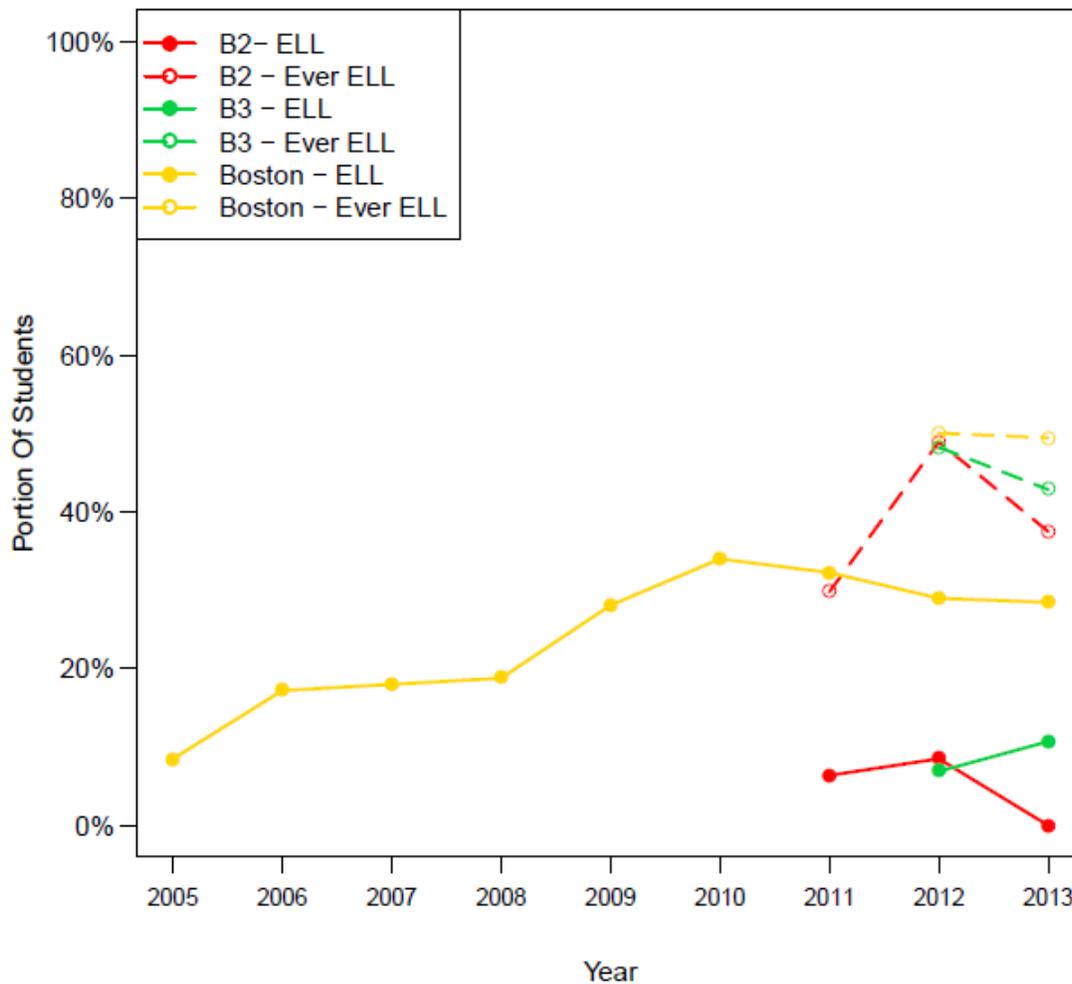
### Recruitment Plan: General Activities

During the 2014-2015 school year, Brooke Charter Schools successfully utilized a third party mail house to engage in direct contact with Boston families, including through use of mailings in multiple languages. Brooke continued their efforts to communicate directly with a diverse range of communities, including through the distribution of information and visits to community centers, Head Start centers, and various community-based organizations. Spanish and Creole speaking representatives of the school also pursued opportunities to engage families in venues frequently visited by high rates of non-native English speakers, and Brooke continues to produce applications and promotional materials in multiple, prevalent languages. With regard to recruitment efforts relative to special education students, all materials explicitly stated that Brooke Charter Schools serves all students, including those with IEPs and 504s. Brooke will also pursue recruitment efforts at Head Start and other programs that serve students with special needs.

Overall proportions of special education students and English language learners at Brooke continue to be significantly lower than for the sending district across all three schools. However, we think the following context is important:

- Our new classes of 5<sup>th</sup> graders have continued to be very representative of the district when it comes to special education. The proportion of students with IEP's has ranged from 18% to 23% over the last 3 years among incoming 5<sup>th</sup> graders. This data shows that our recruitment and retention plan is working. The discrepancy between the overall incidence of special education at Brooke vs. other schools is due to the fact that Brooke has systematically and historically identified a far lower proportion of its own students as special education.
- Our new classes of 5<sup>th</sup> graders have continued to be very representative of the district when it comes to having previously been designated as English Language Learners. However, because Brooke removes that designation from students at a far higher rate than the sending district, many of those students exit ELL status in their first year at Brooke. Therefore, we believe it is both more instructive and fair to measure the rate of EVER-ELL students among our 5<sup>th</sup> grade classes. When we do, as the graph below shows, the proportions of EVER-ELL's among our new 5<sup>th</sup> grade classes is remarkably similar to the district.

**G5 ELL vs. Ever ELL**



- Finally, changing the overall demographic proportions of students at Roslindale is a significant challenge for two reasons: (1) In 2014-15, the only open enrollment grade in Roslindale was Kindergarten, and (2) 1/3 of the 60 spots in Kindergarten for 2014-15 were reserved for siblings of existing students.

Further detail on Brooke’s recruitment efforts for the 2014-2015 and 2015-2016 school years, including data and efforts relative to specific demographic groups, can be found in the template below in the column labeled “Implementation Status and Proposed Changes.”

The following general recruitment activities apply across all three Brooke Charter Schools, and are activities undertaken each year which apply to all students.

General Recruitment Activities	
Activities	Implementation Status & Proposed Changes
Use of a third party mail house to directly contact all families with age-eligible students in Boston and Chelsea Public Schools and all East Boston residents with a mailing sent out in English, Spanish, Creole, Vietnamese and Cape Verdean.	<b>Completed. Will continue in 2015-16.</b>
Advertise in neighborhood Boston newspapers.	<b>Completed. Will continue in 2015-16.</b>
Distribute information directly to community centers, daycare, Head Start, YMCA, Boys and Girls Club, after-school programs, and other community based agencies.	<b>Completed. Will continue in 2015-16.</b>

**Recruitment Plan: Implementation**

The goals and strategies in the following recruitment plan apply across all three Brooke Charter Schools. This section represents the goals and strategies Brooke Charter Schools will implement during the upcoming school year to attract and enroll specific groups of students in order to promote a student population that reflects the demographics of the school’s sending districts. The table below also provides additional narrative on the implementation status and any proposed changes to the recruitment plan, as well as further detail relating to individual schools in the network where necessary and/or appropriate.

Recruitment Plan – Goals and Strategies		
List goals and strategies for recruitment activities for <u>each</u> demographic group.		
Group	Goals & Strategies	Implementation Status & Proposed Changes
A. Special education students	<ul style="list-style-type: none"> <li>• We will explicitly state in our recruitment materials that we serve all students, including students on IEPs and 504s.</li> <li>• We will recruit at Head Start programs that serve students with special needs. We will discuss our program with Head Start staff and ensure that they are aware of our capacity to serve special education students.</li> <li>• We will send our Director of Special Education to student recruitment events to speak directly to families of students with disabilities, and send mailings with application materials to Early Interventions Centers across the city.</li> </ul>	<p><i>All completed in 2014-15.</i></p> <p><i>As the data above indicates, the rate of special education incidence among our incoming 5<sup>th</sup> grade students is identical to the district. However, our overall incidence of special education across our schools remains significantly lower than the district.</i></p> <p><i>In 2015-16, we are collaborating with Parents of Purpose, an organization launched by one of the members of our SPEDPAC, to support children of families in Boston with special needs. We will speak at a meeting of Parents of Purpose about enrollment at Brooke and other Boston charters and will distribute application materials to all members.</i></p>

**Recruitment Plan – Goals and Strategies**  
 List goals and strategies for recruitment activities for each demographic group.

Group	Goals & Strategies	Implementation Status & Proposed Changes
<p>B. Limited English-proficient students</p>	<ul style="list-style-type: none"> <li>• We will produce applications and promotional materials in Spanish, Creole, Cape Verdean, Vietnamese, and other prevalent languages.</li> <li>• We will place advertisements in languages other than English in local newspapers (such as El Planeta and the East Boston Times) or in community newsletters.</li> <li>• We will send representatives from the school who speak Spanish and Creole to community organizations and to well-travelled areas within communities with high rates of non-native English speakers to distribute materials in multiple languages. We will also canvass neighborhoods in East Boston and Mattapan, and participate in the Charter School Fair.</li> <li>• We will send Spanish-speaking recruiters door-to-door to housing developments in East Boston and Chelsea to recruit new families.</li> <li>• We will post advertisements in public transit facilities and vehicles in targeted neighborhoods in Boston and Chelsea.</li> <li>• Also in 2014-15, we will partner with community based organizations, including the Mayor’s Office for New Bostonians and the Consulate General of El Salvador, to deliver recruitment materials and applications to their clientele.</li> </ul>	<p><i>All completed in 2014-15.</i></p> <p><i>As the data above indicates, the rate of Ever-ELL incidence among our incoming 5<sup>th</sup> grade students is identical to the district. However, our overall incidence of ELL across our schools remains significantly lower than the district.</i></p> <p><i>In 2015-16, we will distribute translated application materials at adult ESL programs in Boston.</i></p>

<b>Recruitment Plan – Goals and Strategies</b> List goals and strategies for recruitment activities for <u>each</u> demographic group.		
Group	Goals & Strategies	Implementation Status & Proposed Changes
C. Students eligible for free lunch or reduced priced lunch	<ul style="list-style-type: none"> <li>• We will disseminate application materials to local Head Start facilities, YMCAs, and Boys &amp; Girls Clubs.</li> <li>• In order to recruit more reduced price-lunch qualifying families, we will visit Head Start programs and form relationships with those centers so that we can distribute applications to the parents with the limited financial means.</li> <li>• Staff members will visit WIC centers so that we hopefully post promotional materials and leave applications at those centers.</li> </ul>	<p><b><i>All completed in 2014-15.</i></b>  <b><i>Will continue in 2015-16.</i></b></p>
D. Students who are sub-proficient	<ul style="list-style-type: none"> <li>• We will include in our recruitment information that our school is open to all students, regardless of prior academic performance.</li> <li>• We will contact the principals of BPS schools with low academic performance and request to send fliers and/or applications home with their students or host a recruiting table inside the school or at school events.</li> <li>• We will contact the directors of local Head Start programs and request that recruitment information be distributed to all families, regardless of apparent academic performance.</li> </ul>	<p><b><i>All completed in 2014-15.</i></b>  <b><i>Will continue in 2015-16.</i></b></p>

<b>Recruitment Plan – Goals and Strategies</b> List goals and strategies for recruitment activities for <u>each</u> demographic group.		
Group	Goals & Strategies	Implementation Status & Proposed Changes
E. Students at risk of dropping out of school	<ul style="list-style-type: none"> <li>• We will include in our recruitment information that our school is open to all students, regardless of prior academic performance.</li> <li>• We will contact the principals of BPS schools with low academic performance and request to send fliers and/or applications home with their students or host a recruiting table inside the school or at school events.</li> <li>• We will contact the directors of local Head Start programs and request that recruitment information be distributed to all families, regardless of apparent academic performance.</li> </ul>	<p><b><i>All completed in 2014-15.</i></b>  <b><i>Will continue in 2015-16.</i></b></p>
F. Other subgroups of students who should be targeted to eliminate the achievement gap	<ul style="list-style-type: none"> <li>• We will work to recruit African-American students because that subgroup must be targeted to close the achievement gap.</li> <li>• We will advertise in the Bay State Banner, the leading newspaper for the Boston African-American community.</li> <li>• We will contact personnel at predominantly African-American churches and community centers to develop relationships that will enable us to distribute applications there.</li> </ul>	<p><b><i>All completed in 2014-15.</i></b>  <b><i>Will continue in 2015-16.</i></b></p>

### Retention Plan: General Activities

During the 2014-2015 school year, Brooke Charter Schools retained 95.3% of students across all three campuses, meeting our goal of a 95% or higher retention rate across all schools. By providing clear information to parents throughout the orientation process,

The goals and strategies in the following retention plan apply across all three Brooke Charter Schools. This section represents the goals and strategies Brooke Charter Schools will implement during the upcoming school year to maximize the number of students who successfully complete all school requirements and to prevent students from dropping out. The table below also provides additional narrative on the implementation status and any proposed changes to the retention plan, as well as further detail relating to individual schools in the network where necessary and/or appropriate

Overall Student Retention Goal	
Annual goal for student retention (percentage):	Implementation Status & Proposed Changes
We aim to retain 95% of our students who remain in the Boston area. Boston Public Schools has an attrition rate of 9.3% and we have a 4.7% attrition rate; we therefore believe that we are already retaining a higher percentage of our students than our sending district is.	<b><i>Will continue with the goal of an attrition rate of 5% or less (combined across all Brooke Charter Schools).</i></b>

The following goals and strategies apply across each demographic group (Special education students, Limited English-proficient students, Students eligible for free or reduced lunch, Students who are sub-proficient, Students at risk of dropping out of school, and African-American students (as a specific subgroup of students who should be targeted to eliminate the achievement gap)).

## Retention Plan: Implementation

Retention Plan Goals and Strategies -- List goals and strategies for retention activities for each demographic group.

Goals & Strategies	Description	Implementation Status & Proposed Changes
Retention Activity 1	Provide clear information to incoming parents through conducting multiple orientation sessions and written documentation of our policies and philosophies. We believe that this will help ensure that parents who enroll in our school are clear about our school program and aligned with our mission.	<i>Completed. Will continue in 2015-16.</i>
Retention Activity 2	Continue to improve our educational program in upper grades. We have historically lost students to exam schools, and we believe that we have and will continue to address this quality concern by providing an educational program that enables our students to outperform exam schools.	<i>Pending amendment application to create a high school.</i>
A. Special Education Students	Ensure that special education students are achieving at a level that is significantly higher than special education students across the state. Ensure that in addition to IEP specifications, special education students are receiving adequate academic support from classroom teachers such that they can succeed in the classroom.	<i>Completed. Will continue in 2015-16</i>
B. Limited English Proficient Students	Ensure that students are learning English fast enough to move out of LEP designation within 2-3 years and are subsequently able to succeed academically. Ensure that in addition to LEP requirements, students are receiving adequate academic support from classroom teachers such that they can succeed in the classroom.	<i>Completed. Will continue in 2015-16</i>
C. Students eligible for free or reduced price lunch	We will ensure that we minimize required parent fees (i.e. field trip fees and activity fees) and/or make fees "pay as you can".	<i>Completed. Will continue in 2015-16.</i>
D. Students at risk of dropping out	Increase communication with parents of struggling students so they are receiving at least monthly progress updates for the second two trimesters in person or on the phone. Some of the students who leave our program are students who have been retained in a grade level, and we believe we could get more parental support for keeping the student at Brooke if we increased the frequency of oral communication with the parent.	<i>Completed. Will continue in 2015-16. Frequent communication with parents and strong relationships will continue to be a significant focus of teacher development.</i>

Retention Plan Goals and Strategies -- List goals and strategies for retention activities for each demographic group.

Goals & Strategies	Description	Implementation Status & Proposed Changes
<b>E. Students who are sub-proficient</b>	<p>Create a homework program for students who chronically have failing homework grades. We have a homework completion program, but some students who are enrolled in that program still have not been successful in completing all their homework. Therefore, this year, we are adding a program for a select group of students where the students stay at school until every piece of homework is complete.</p>	<p><b>Completed.</b> <i>Will continue in 2015-16.</i></p>
<b>F. Other subgroups</b>	<p>We will monitor achievement rates of African-American students and ensure that they are at least commensurate with achievement rates of other demographic groups in all three Brooke schools.</p>	<p><b>Completed.</b> <i>Will continue in 2015-16.</i></p>

## APPENDIX C: SCHOOL & STUDENT DATA TABLES

### Student Data

Student demographic information for Brooke Charter Schools can be found on the Massachusetts Department of Elementary and Secondary Education website. Below are links to each school's demographic profile, and tables depicting student demographic and subgroup information.

Note that the 2014-2015 data for "economically disadvantaged" and "high needs" reflects a new income status metric developed by the Department of Elementary and Secondary Education (DESE).

The following are descriptions of the two measures provided by DESE:

**High Needs:** Calculated based on the number of high needs students, divided by the adjusted enrollment. A student is high needs if he or she is designated as either low income (prior to School Year 2015), economically disadvantaged (starting in School Year 2015), or ELL, or former ELL, or a student with disabilities. A former ELL student is a student not currently an ELL, but had been at some point in the two previous academic years. Source: SIMS, See [Understanding the Economically Disadvantaged Indicator](#)

**Economically Disadvantaged:** based on a student's participation in one or more of the following state-administered programs: the Supplemental Nutrition Assistance Program (SNAP); the Transitional Assistance for Families with Dependent Children (TAFDC); the Department of Children and Families' (DCF) foster care program; and MassHealth (Medicaid). Source: See [Understanding the Economically Disadvantaged Indicator](#)

## Student Demographic Information

Brooke Charter School Roslindale (SY 14-15 Total Enrollment 506):

<http://profiles.doe.mass.edu/profiles/student.aspx?orgcode=04280305&orgtypecode=6&&fycode=2015>

STUDENT DEMOGRAPHIC AND SUBGROUP INFORMATION*		
Race/Ethnicity	# of students	% of entire student body
African-American	350	69.2
Asian	7	1.4
Hispanic	122	24.1
Native American	0	0.0
White	6	1.2
Native Hawaiian, Pacific Islander	0	0.0
Multi-race, non-Hispanic	21	4.2
First Language not English	78	15.4
English Language Learner	4	0.8
Students With Disabilities	34	7.1
High Needs	220	43.5
Economically Disadvantaged	190	37.5

\* # students rounded up to nearest whole number

Brooke Charter School Mattapan (SY 14-15 Total Enrollment 460):

<http://profiles.doe.mass.edu/profiles/student.aspx?orgcode=04430000&orgtypecode=5&>

STUDENT DEMOGRAPHIC AND SUBGROUP INFORMATION*		
Race/Ethnicity	# of students	% of entire student body
African-American	318	69.1
Asian	5	1.1
Hispanic	114	24.8
Native American	3	0.7
White	15	3.3
Native Hawaiian, Pacific Islander	0	0.0
Multi-race, non-Hispanic	5	1.1
First Language not English	186	40.4
English Language Learner	32	5.0
Students With Disabilities	44	9.6
High Needs	294	63.9
Economically Disadvantaged	219	47.6

\* # students rounded up to nearest whole number

## Brooke Charter School East Boston (SY 14-15 Total Enrollment

393): <http://profiles.doe.mass.edu/profiles/student.aspx?orgcode=04570000&orgtypecode=5&>

STUDENT DEMOGRAPHIC AND SUBGROUP INFORMATION		
Race/Ethnicity	# of students	% of entire student body
African-American	95	24.2
Asian	11	2.8
Hispanic	221	56.2
Native American	5	1.3
White	53	13.5
Native Hawaiian, Pacific Islander	0	0.0
Multi-race, non-Hispanic	8	2.0
First Language not English	268	68.2
English Language Learner	55	14
Students With Disabilities	34	8.7
High Needs	279	71.0
Economically Disadvantaged	191	48.6

\* # students rounded up to nearest whole number

### Administrative Roster: 2014-2015 School Year

For a more complete listing of network and school-based personnel, please visit <http://www.ebrooke.org/about-us/our-team/>.

ADMINISTRATIVE ROSTER FOR THE 2013-2014 SCHOOL YEAR			
Name, Title	Brief Job Description	Start date	End date (if no longer employed at the school)
Kimberly Steadman, Co-Director	Responsible for academic program across all Brooke Schools	August 1, 2006	NA
Jon Clark, Co-Director	Responsible for all non-academic areas across all Brooke Schools	August 1, 2002	NA
Scott Knox, Chief Development Officer, Network	Responsible for fundraising, board development, and external relations	August 1, 2010	NA
Christopher Bizzacco, Chief Operating Officer, Network	Responsible for operations across the network	May 20, 2013	NA
Rachel Kohn, Director of Talent Recruitment, Network	Responsible for staff recruitment	July 7, 2014	NA
Yonah Meiselman, Data Manager, Network	Responsible for data coordination across network	September 8, 2014	NA
Matt Cameron, Business Manager, Network	Coordinates finance across the network	December 1, 2011	NA
Yvette Philip, Associate Business Manager	Manages day-to-day accounting functions and assisting COO and Business Manager	June 9, 2014	NA
Elaine Morgan, HR & Finance Manager, Network	Responsible for HR facilitation, payroll, and purchasing	August 1, 2006	NA
Trelani Law, Finance Associate	Facilitates and reconciles purchasing and accounts management	January 16, 2015	NA
Cristie McGrath, Director of Student Support	Direct supervisor of related service providers for special student populations	August 29, 2005	NA
Sarah Holden, Director, Office of High School & College Success	Oversee the implementation of a student and family high school placement program and advising to ensure matriculation to college preparatory high schools and college	August 3, 2011	NA
Meg Thornton, Principal, Brooke Roslindale	Responsible for all organizational performance with focus on academics	August 1, 2011	NA
Julio Chow-Gamboa, Director of Operations, Brooke Roslindale	Responsible for all non-academic areas of organizational performance	July 25, 2013	June 30, 2015

## ADMINISTRATIVE ROSTER FOR THE 2013-2014 SCHOOL YEAR

Name, Title	Brief Job Description	Start date	End date (if no longer employed at the school)
Abby Waldman, Assistant Principal, Brooke Roslindale	Responsible for academics in grades 3-5 and co-curricular department	August 1, 2012	NA
Jorge Martinez, Dean of Students, Brooke Roslindale	Responsible for student culture and behavior	August 1, 2005	NA
Katie Megrian, Principal, Brooke Mattapan	Responsible for all organizational performance with focus on academics	August 1, 2011	NA
Kimberly Bartlett, Director of Operations, Brooke Mattapan	Responsible for all non-academic areas of organizational performance	August 1, 2011	NA
Katherine Barnes, Assistant Principal, Brooke Mattapan	Responsible for academics in grades K-2 and coordinator of Associate Teacher Program	August 1, 2011	NA
Alex Forrest, Dean of Students, Brooke Mattapan	Responsible for student culture and behavior	August 1, 2011	NA
Molly Cole, Principal, Brooke East Boston	Responsible for all organizational performance with focus on academics	August 1, 2012	NA
Jennifer Stange, Director of Operations, Brooke East Boston	Responsible for all non-academic areas of organizational performance	August 1, 2012	NA
Stacy Diaz, Dean of Students, Brooke East Boston	Responsible for student culture and behavior	August 1, 2012	NA

### Teachers & Staff Attrition: 2014-2015 School Year

TEACHERS AND STAFF ATTRITION FOR THE 2012-2013 SCHOOL YEAR			
	Number as of the last day of the 2014-2015 school year	Departures during the 2014-2015 school year	Departures at the end of the 2014-2015 school year
Teachers	Brooke Roslindale: 41 Brooke Mattapan: 45 Brooke East Boston: 37	Brooke Roslindale: 0 Brooke Mattapan: 3 Brooke East Boston: 1	Brooke Roslindale: 11 Brooke Mattapan: 7 Brooke East Boston: 7
Other Staff	Brooke Roslindale: 15 Brooke Mattapan: 7 Brooke East Boston: 6	Brooke Roslindale: 2 Brooke Mattapan: 0 Brooke East Boston: 0	Brooke Roslindale: 2 Brooke Mattapan: 1 Brooke East Boston: 1

#### Narrative of Teacher Attrition Trends

**Accountability Plan Measure:** BCS will retain 80% of teachers from one school year to the next, excluding those who leave for purposes of geographic re-location.

**2014-2015:** Excluding Brooke Charter School teachers who left for purposes of geographic re-location, 17 lead teachers employed during the 2014-15 school year will not be returning for the 2015-16 school year. Therefore, Brooke retained 86% of teachers from one school year to the next. This is in line with historical Brooke trends. Among those teachers leaving, the reasons were:

- Contract terminated or not renewed: 10
- Geographic relocation: 12
- Career change or graduate school: 4
- Personal reasons: 3

## Brooke Charter School Board of Trustees (2014-15)

Name	Role	Committee Membership	Term Exp.	Tenure
Scott Oran	Chairman	Facilities, Governance	2016	2010
Hilary Berkman	Treasurer	Finance	2015	2002
Cornell LaRoy Brantley	Member	Finance	2015	2011
Bart Bussink	Member	Facilities	2016	2006
Alex Finklestein	Member	Development	2016	2012
Lauren Kushman	Member	Governance	2015	2011
Joanna Jacobson	Member	Governance	2015	2013
Charles Ledley	Member		2016	2014
Imari Paris-Jeffries	Member	Development	2016	2012
Jon Clark	Ex-Officio	Development, Facilities, Finance, Governance (non-voting)	N/A	2002
Kimberly Steadman	Ex-Officio	Governance (non-voting)	N/A	2009

**APPENDIX D: ADDITIONAL REQUIRED INFORMATION****Key Leadership Changes**

N/A below indicates there is no change in the name of the individual holding the listed position.

Position	Name
Board of Trustees Chairperson	N/A
Charter School Leader	N/A
Assist. Charter School Leader	N/A
Special Education Director	N/A
MCAS Test Coordinator	N/A
SIMS Coordinator	N/A
English Language Learner Director	N/A

**Facilities**

Below is a listing of school facilities that have been relocated or newly acquired within Brooke Charter School's current municipality.

Location	Dates of Occupancy
<b>Brooke Charter School Mattapan</b> <ul style="list-style-type: none"> <li>Former Location: 7 Elkins Street Boston, MA 02127</li> <li>New Location: 150 American Legion Highway Boston, MA 02124</li> </ul>	July 17, 2014 (Certificate of Occupancy) August 11, 2014 (First Day of Classes)
<b>Brooke Charter School East Boston</b> <ul style="list-style-type: none"> <li>Former Location: 189 Paris Street Boston, MA 02128</li> <li>New Location: 94 Horace Street Boston, MA 02128</li> </ul>	July 17, 2014 (Certificate of Occupancy) August 11, 2014 (First Day of Classes)

### Enrollment

Below is the estimated student application deadline and lottery date for students who are interested in enrolling for the 2015-2016 school year.

Action	Date(s)
Student Application Deadline	February 26, 2016
Lottery	March 2, 2016

### Complaints

The Board of Trustees received no official complaints in 2014-15.

### Conditions

There are no conditions at the present time at any of the three Brooke Charter Schools.