

ATTACHMENT B
Cover Letter

Name of Respondent: Great Oaks Foundation

Provider Type (please choose one):

- ☐ Individual
☒ Charter organization
☐ School Management organization
☐ Other (please describe)

Current School District Employee:

- ☐ Yes
☒ No

Permanent Address of Respondent:

Street: 222 Broadway, 19th Floor City: New York
State: NY Zip: 10038
Telephone: 917-239-3641 Fax: N/A
Email: mduffy@greatoakscharter.org
Website: www.greatoakscharter.org Federal ID#: 27-5281234

Name of person(s) authorized to represent the Respondent concerning this Submission:

Michael Thomas Duffy
Title: President

*** By signing this letter, I hereby represent on behalf of the Respondent that I am authorized to submit this proposal on behalf of the Respondent. I further represent that all information provided in this proposal is accurate and truthful. I understand that the proposal will be immediately disqualified if any misrepresentations are made in the proposal. I further understand that the Respondent's proposal will be evaluated based on the qualifications of the Respondent to run a school on a daily basis. Responses that do not contemplate operating a school without additional resources, supports or organizations will be disqualified. ***

Authorized Representative Signature:

Print Name, Title Here: _____

Signature: _____

Date: _____

Section 1: Turnaround Approach

1. Provide an overview of the organization's philosophy towards operating schools and describe how this approach is applicable to whole school turnaround. Include a brief description of the evidence-based practices and key components of the organization's turnaround approach (i.e. priorities, expectations, etc).

The mission of the Great Oaks (GO) Foundation is to launch and support a network of charter schools that prepare students for college success through high-dosage tutoring. By design, our schools contribute to the vitality of the urban neighborhoods where they are located by attracting and creating social, human and investment capital. The academic model of our schools was inspired by the Match Charter School of Boston, which has had an extraordinary track record of success using high-dosage tutoring over the last decade and a half to prepare its graduates for success in college.

What sets the GO turnaround approach apart is our high-dosage tutoring model. The GO Tutor Corps, a highly selective group of recent college graduates, delivers two periods of individual instruction to every student, four days a week. High-dosage tutoring is one of the key practices in charter schools found to raise academic achievement.¹ At each GO school we have established a 1 to 5 tutor-to-student ratio that is made possible in part by the support that the GO Foundation receives from the federal AmeriCorps program. We provide each one of our tutors with a modest stipend, housing and health-care coverage. It is this element of our program that would be the most powerful and immediate driver of student success at Jay Cooke School (Cooke) in addition to quality instruction and clear school priorities during the 2016-17 school year.

We have successfully implemented this model and seen strong academic growth in schools serving a similar population to that of Cooke including:

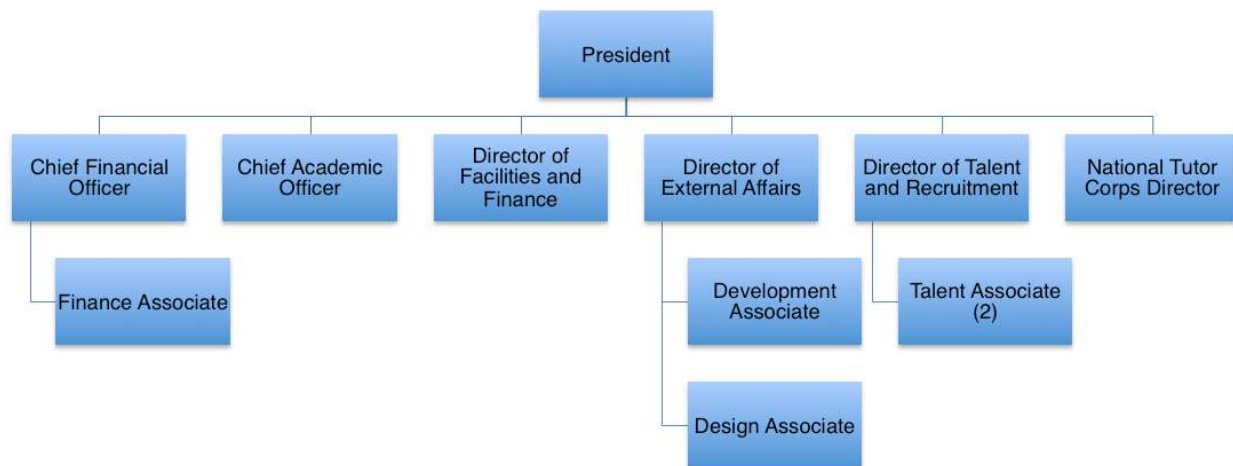
- **Great Oaks Charter School - Newark:** 83% of students are Black and 17% are Latino. 80% are eligible for free and reduced-price lunch. 12% of the population has an IEP.
- **Great Oaks Charter School - New York City:** 29% of students are Black, 40% are Latino, 29% are Asian and 2% are White. 85% are eligible for free and reduced-price lunch. 35% of the population has an IEP.
- **Great Oaks Charter School - Bridgeport:** 56% of students are Black, 13% are Latino, 29% are Multi-racial and 2% are White. 85% are eligible for free and reduced-price lunch. 11% of the population has an IEP.
- **Great Oaks Charter School - Wilmington:** Great Oaks - Wilmington is currently

¹ Fryer, Roland. 2012. "Learning from the Successes and Failures of Charter Schools." Hamilton Project Discussion Paper 2012-06, Washington D.C.: Brookings Institution Press. 2012.

enrolling its first class of 6th graders. Based on preliminary data, 76% of students are Black, 15% are Latino, 6% are Multi-racial and 3% are White. 85% are eligible for free and reduced-price lunch. 18% of the population has an IEP.

2. Describe the organization's staffing structure, including key administrative roles, key programmatic positions, and average staffing (student to teacher and administration) ratios in existing schools.

An organizational chart for the Great Oaks Foundation, which would serve as the charter management organization, is below:



The GO Foundation's leadership represents a wealth of knowledge of charter school management, academic leadership and financial management. Key members of the leadership team who will manage the turnaround include:

Michael Thomas Duffy, President: As President, Mr. Duffy spearheaded the initiative to launch and establish the Great Oaks Foundation. He previously served as Director of the Charter School Office for the New York City Department of Education, working under the leadership of Chancellor Joel Klein for three years. Prior to that, he served as the Executive Director of City on a Hill Charter Public School. Mr. Duffy was the founding board Chair of the MATCH Charter High school in Boston, which has been consistently named as one of the top public high schools in the country by US News & World Report and Newsweek magazines, among others. Mr. Duffy has a Master in Public Policy degree from the JFK School of Government at Harvard University where he wrote his thesis on business support for child day care. He currently serves as an adjunct professor at NYU's Wagner Graduate School of Public Service where he teaches courses on Strategic Management and Service Delivery. Mr. Duffy graduated Phi Beta Kappa from Trinity College in Connecticut with a degree in Economics. As a kid, Mr. Duffy lived just outside of Philadelphia in King of Prussia and attended the St. Augustine parochial school in Bridgeport. Mr. Duffy will spend approximately 20% of his

time focused on this school over the course of the next year.

Rashaun Reid, Chief Academic Officer: Mr. Reid is responsible for the academic support of curriculum, instruction, and assessment within Great Oaks' schools. In partnership with each school's Executive Director, he supports each school in implementing best instructional practices, identifying research based curriculum, and monitoring academic progress. Prior to joining the GO Foundation, Mr. Reid served as both a turnaround Assistant Principal and Principal in two of Philadelphia's most challenging renaissance schools. As Principal, Mr. Reid effectively turned around the academic and culture performance of a Philadelphia middle school and earned his school the designation of "model" status as a result of drastically decreasing violence and suspensions. Prior to working as a school leader, Mr. Reid served as an elementary school teacher in Philadelphia. Mr. Reid is a graduate of Temple University, holding a Bachelors Degree in Elementary and Early Childhood Education as well as a Masters Degree in Educational Leadership. Mr. Reid lives in Philadelphia, where he owns a home. Mr. Reid will spend approximately 30% of his time focused on this school until an Executive Director is hired.

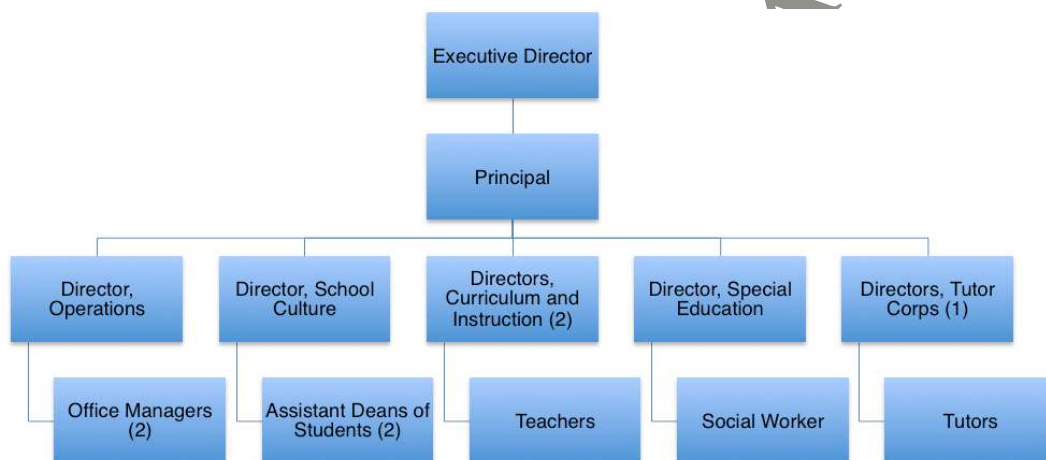
Rick Iandoli, Chief Financial Officer: As CFO, Mr. Iandoli is responsible for creating and managing school budgets in conjunction with each school's Executive Director, ensuring the careful management and stewardship of all monies, providing regular reports on the financial health of each school for the board, acting as point person for all auditing, banking, and lending relationships, and establishing prudent resource controls and fiscal policies for each school. Mr. Iandoli has held finance leadership positions at numerous organizations including Edison Learning where he served as Controller-District Partnerships. Just prior to joining Great Oaks, Mr. Iandoli was Theology Chair of St. Dominic H.S. Mr. Iandoli is a Certified Public Accountant. Mr. Iandoli will spend approximately 25% of his time focused on this school.

Michael McGregor, Finance & Facilities Director: Mr. McGregor is leading the work related to the intersection of Great Oaks' school and tutor facilities, financing and community development. Prior to coming to Great Oaks, he worked as a teacher and administrator at the Match Charter Public High School in Boston. He joined Match as a member of the school's residential tutoring fellowship before becoming the assistant director of the program, a member of the school's leadership team, and, most enjoyably, a World History teacher. Mr. McGregor earned his Bachelors degree from the University of Pennsylvania, during which time he volunteered in the Philadelphia public schools as a tutor; Mr. McGregor is currently completing an MBA at Columbia University. Mr. McGregor will spend approximately 40% of his time focused on this school.

Our approach to turnaround school operation mobilizes the components of our model that align with Practices that Hold Promise from the U.S. Department of Education's

research on turning around chronically underperforming schools.² To ensure we can accomplish this task at Cooke, we will install new leadership that is experienced in best practices and committed to implementing a strong school vision. We've observed the direct connection between strong leadership and school culture most recently in our Wilmington, DE school, which opened with tremendous success in fall 2015, as well as our New York City and Bridgeport campuses, which continue to grow. To improve academics in underperforming schools, the Department of Education also recommends maintaining a focus on improving instruction by tailoring opportunities for development to school and teacher needs. Our schools have seen the most growth in teacher development and school culture through creation of upper and lower schools that provide students and teachers with true elementary, middle, and high school experiences. We will create a focus on instruction by dividing leadership responsibilities and structure the Cooke school to function as one school that maintains one vision with upper and lower elementary /middle school leadership teams.

Below is the proposed Turnaround Year 1 organizational chart for the school.



Our schools have seen success with upper and lower schools that provide students with a true elementary, middle, or high school experiences. Our school will function with one vision and be staffed with a team of 20 teachers that are divided between a lower and upper school. The current enrollment pattern identifies 2-3 cohorts per grade. Our instructional model has a blocked tutorial model during which all 39 tutors are available to tutor students within a grade band using researched-based instructional materials. As a result of this structure, all students K-8 within a grade band receive tutoring that is personalized to their need twice a day in a group of no more than 4 students.

Describe the instructional methods, curricular tools, and academic supports that

² Source: From *Turning Around Chronically Low-Performing Schools: A Practice Guide*, by R. Herman, P. Dawson, T. Dee, J. Greene, R. Maynard, S. Redding, and M. Darwin, 2008, Washington, DC: National Center for Education Evaluation and Regional Assistance, Institute of Education Sciences, U.S. Department of Education.

will promote swift and dramatic academic growth. Note any essential instructional elements and list key strategies that will drive instructions.

Results and research from the Match Corps Program confirms the positive impact of high dosage tutoring³. Our turnaround approach uses this component of our school model to reinforce the U.S. Department of Education's recommendation to build a committed staff. Our instructional approach will prioritize preparing all students for grade level reading instruction by the fourth grade and use pair the efforts of teachers with tutors to drive academic achievement with the goal of equipping our students with the skills that are needed to succeed enter competitive high schools and graduate college. To promote swift academic gains and stabilize learning we will implement the following components into the academic program at Cooke:

- **A standard approach to teaching that drives teacher skill development and prioritizes student outcomes in the classroom:** We have seen the most growth in teacher skill through the partnership we have developed with The New Teacher Project (TNTP) in our current schools. Our partnership has established a standard rubric for teaching that prioritizes key strategies needed for high impact instruction. This partnership has been very successful at allowing school leaders to provide teachers with weekly feedback that captures their teaching skills, identifies student outcomes that are the result of their teaching actions, and highlights one clear next step to help increase the effectiveness of delivery. Through at least weekly observations, feedback sessions and lesson planning, school leaders within our network are able to target professional development to meet the needs of school-wide instructional trends. We believe that using a consistent instructional approach for historically underperforming students rapidly increases their orientation to instruction and allows them to navigate their academic experience in a predictable way. We have begun exploring partnership opportunities with TNTP in Philadelphia to implement a similar model at Cooke.
- **Daily, individualized, research-based literacy instruction in Grades K-6:** We believe that improvement in reading requires the implementation of a unified, research-based approach to literacy instruction that will provide students with opportunities to experience individualized reading instruction every day. The infusion of the Great Oaks Tutor Corps allows our schools to provide students with frequent opportunities for targeted reading instruction and will allow our staff to boost the academic reading performance of students at Cooke. Recognizing that our average student enters our schools with reading skills at the 3rd grade level, we value the importance of intensive, research-based literacy instruction and have noted significant academic growth at our schools using the Fountas and Pinnell Leveled Literacy Intervention (LLI) system to provide systematic reading instruction. Daily LLI instruction will be one of three reading experiences

³ (Kraft, Matthew. 2013. "How to Make Additional Time Matter: Integrating Individualized Tutorials Into an Extended Day." Harvard Graduate School of Education: Cambridge, MA.).

students participation in each school day.

- **Three tiers of reading instruction each school day:** Research in What At-Risk Readers Need confirm that a three-tiered model has become the most common form in RTI initiatives, an initiative directly aimed at closing the gap in reading. The first tier is the classroom reading lessons that the student receives. The second tier is additional expert reading instruction typically offered daily in a small group. The third and final tier provides one-on-one daily tutorials. Participating in high-quality reading lessons in each of the three tiers as needed should dramatically reduce the numbers of students experiencing difficulties in learning to read⁴. The infusion of the Great Oaks Tutor Corps allows our schools to provide students with three periods of targeted reading instruction and will allow our staff to boost the academic reading performance of students at Cooke. The academic performance of students indicates similarities with students at our current schools in which our average 6th grade student enters our schools with reading skills at the 3rd grade level.
- **Block 1: Daily whole group reading instruction in Grades K-6:** Our academic program also recognizes the importance of whole group reading instruction as a key component to reading development. All students will participate in a whole group reading course to develop ability to communicate, ask questions, and share ideas about texts. A grade break down is below:
 - K-2 – Daily Read Aloud using high interest big books and stories
 - 3-8 – Novel based literature instruction
- **Block 2: Targeted Small Group Instruction:** To provide students with frequent exposure to intensive, research-based literacy instruction, we use the Fountas and Pinnell Leveled Literacy Intervention system. We have noted significant academic growth at our schools using the Fountas and Pinnell Leveled Literacy Intervention (LLI) system to provide systematic reading instruction. Daily LLI instruction will be one of three reading experiences students participation in each school day. This will occur during tutorial.
- **Block 3 Explicit Vocabulary Instruction in Grades K-8:** The shift to reading to learn requires explicit instruction on the challenging words students will encounter in difficult texts. All students will have daily instruction in language and vocabulary.
- **Increased Math Exposure in Grades K-8:** All students will receive targeted math instruction in a small group setting that is personalized to their needs. We currently use the Northwest Evaluation Association's Measures of Academic Progress (NWEA Map) to establish baseline data about student performance. By

⁴ March 2011 | Volume 68 | Number 6 What Students Need to Learn Pages 40-45 What At-Risk Readers Need
Richard L. Allington

arming our Tutor Corps with this information and training them on effective small group instruction, our students saw 1.2 years' growth in Math. It is our plan to implement this approach at Cooke to ensure students make dramatic academic gains during the school year.

- **Daily Writing Instruction in Grades K-8:** All students will receive daily instruction in writing to ensure they are prepared to demonstrate the communication skills required by difficult constructed responses and across genres.
- **Social Emotional Learning K-8 (SEL):** Decision and choice making are learned skills that are best honed by the knowledge students gain from adults. Research on teaching SEL skills confirm that Small-group and individual coaching work for both academic and SEL instruction. Just as you might pull together a small group of students who all need to practice long division, so, too, you might pull together a small group to reteach and practice setting realistic personal goals⁵. Our Tutor Corps will expose students to a cadre of young professionals who have learned the skills that are needed to succeed in college and can serve as models and coaches for self managements through the relationships they will make with students.
- **Communication of data through cyclical program evaluation and progress monitoring:** Our approach recognizes the importance of data driven instruction as a critical component of fostering a community of high achievement. Recommendations by the U.S. Department of Education reinforce the importance of using data to drive instruction and holding teachers accountable for student outcomes. In order to capture and share student data our schools use some of the most widely recognized assessments in K-12 education including:
 - STAR assessment in Reading and Math
 - 4sight Benchmark Assessment
 - Fountas and Pinnell Reading Assessment
 - Northwest Evaluation Association MAP

Our vision is to implement the Fountas and Pinnell (K-8), 4sight (3-8) and the Northwest Evaluation Association MAP (K-8) to ensure teachers and tutors, parents, and stakeholders are constantly armed with actionable informative student data. Using this data, our instructional team will strategically schedule students in need of remediation for intense instruction using research-based curriculum in a small group setting. Accessing and using this data to drive instruction will be a critical step for the new leadership team of Cooke to support student achievement.

⁵ October 2015 | Volume 73 | Number 2 Emotionally Healthy Kids Social-Emotional Learning and Academics: Better Together

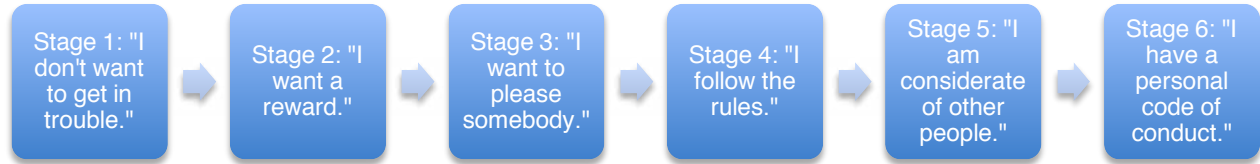
- **Student Benchmarking System 1-8:** Our current schools plan instruction towards a targeted scope and sequence provided by an external provider that is aligned to the Common Core standards. We currently administer standards-aligned interim assessments quarterly to assess student progress toward meeting Common Core standards. Our schools will all utilize an internal benchmark developed specially for our network of schools for the 2016-17 school year that is aligned to the Common Core and used to drive teaching within our buildings towards specific academic goals. We support the use of data through three hours of weekly professional development on with early dismissal one day per week. Every six weeks, we will facilitate Data Days during which school leaders and staff devote a full day of professional development to reviewing data and identifying action steps for re-teaching content to individual students. Our instructors have access to a bank of high quality lesson plans, curricular resources and assessments from the Achievement Network and Mastery Connect an online platform for teachers and school leaders.

3. Describe the structures and programs that the organization will establish and implement in order to ensure that the school's climate is safe, welcoming, and will promote student learning.

We believe that academics and school culture must be approached with a sense of urgency. The GO Foundation creates a “warm-strict” school culture that blends discipline and love. We recognize the importance of school experiences at the varying grade levels and are strategic in developing buildings for different student age groups. At our school in Newark, we’ve seen tremendous success in dividing our middle and high school buildings and are planning for similar success during the 2017-18 school year when our students will enter high school in New York and Bridgeport.

To promote a climate that is safe and will promote student learning we are prepared to implement *one community of lower and upper schools*. The design of our model reinforces this importance, as does the experience of the GO Foundation team. GO schools fairly and consistently enforce a Code of Conduct to ensure safety and create a climate where every student can achieve. The individual attention devoted to students enables them to maximize their potential and graduate with the knowledge, skills and habits of mind to earn a college degree. We believe that every adult at every GO school is responsible for building a strong school culture. To ensure we can accomplish this task at Cooke, we will structure the school to include two schools within one that maintain one vision with upper and lower elementary leadership structures.

All teachers, tutors and administrators will be aligned in creating a strong school culture by implementing consistent responses to student misbehavior and creating incentives for positive behaviors. The teaching, training, and practice of conduct expected GO schools are underpinned by the teaching and practice of Kohlberg's Six Stages of Moral Development.



Students must adhere to their own personal code of conduct. GO schools support students' development by setting clear expectations, explicitly stating expectations, and holding students responsible for their choices. Students are expected to follow the 10 "Non-Negotiable" at all times: 1) Attend school daily. Arrive on time and remain at school for the entire day; 2) Respect **all** members of the community; 3) Be focused on learning and take active notes throughout every class; 4) Arrive on time to each class and be seated and silently working on "Do-Now" when the first bell rings; 5) Follow the dress code; 6) Be prepared for every class by arriving with the necessary tools to effectively participate; 7) Respect the building and all community property; 8) Turn off and put away all electronic devices before entering school; 9) Always have a pass in the hallways; 10) Complete all assignments with academic honesty and integrity.

There are two ways in which GO schools support students in meeting expectations. First, students learn and practice expectations during Orientation. Second, the Great Oaks Check system will keep track of four types of information:

- **Daily Attendance:** Cumulative record of tardiness and excused/unexcused absences throughout the year
- **Weekly Homework Completion:** Homework completion is vital to student success. Homeroom classes that lead the school in homework completion rates will earn rewards and recognition.
- **"Above and Beyond" points (merits) are rewarded to students who go above and beyond in meeting core values.** Students may redeem points for school spirit items and special reward events.
- **"Demerits" are earned when a student does not follow the Code of Conduct.** There are consequences when a student earns multiple demerits. The more demerits a student earns, the heavier the consequence.

Merit points and demerits will be tracked on the Great Oaks Check. Checks will be distributed to students on a weekly basis. A parent/guardian must review the check with the student. **All parent(s)/guardian(s) must check and sign the Weekly GO Check.** Students keep up with their point and demerit totals each day by keeping a daily tally. Points earned will be accounted for daily. Point and demerit totals will be posted every day. Consequences for behavior are directly related to the number of demerits a student has accumulated for the **day and week**. All detention responsibilities must be served by the end of each week. Un-served detention time at the end of the week will result in a

Friday Detention to pay off the remaining consequence.

The Executive Director, teachers and tutors will engage in weekly individual parent outreach by calling home to families to let them know how their child is doing in school. We log and track the thousands of calls made home each year. At the current GO schools, we've seen that student success is contingent upon a community of support. Such a community includes teachers, school leaders, tutors, students and - crucially - families. We believe that students' families can be tapped to leverage greater effort from students, ultimately leading to better outcomes.

Section 2: Track Record

1. Complete Attachment C. If data are presented for schools operated outside of Pennsylvania, describe key contextual elements of the other school(s) (e.g., student demographics, standardized test(s) administered, state/local accountability tool(s) that are used to assess the school, governance structure, etc). Include data that cover the school's performance in the year preceding the organization's involvement.

Please see Attachment C.

2. Highlight up to five specific areas of success and up to five specific areas for growth in the academic and climate programs at the organization's schools. Provide a rationale for each of the examples cited.

The GO Foundation's schools' greatest areas of success to date include:

- **Student growth:** The average student enters our schools in 6th grade performing at a 3rd grade level. The GO Foundation's flagship school, Great Oaks - Newark consistently ranks in the 99th percentile for student growth across the entire state of New Jersey, according to student growth percentiles based on state exams, calculated by the State of New Jersey. We've seen significant year over year growth in other Great Oaks schools as well; data from the NWEA Map Assessment shows students at Great Oaks - Bridgeport, which opened in 2014, growing 1.2 grade levels in Math and 1.8 grade levels in Reading, in just one year.
- **Investment in communities:** By design, GO schools contribute to the vitality of the urban neighborhoods where they are located by attracting and creating social, human and investment capital. In large part, our community investment strategy revolves around facilities. In Newark, the GO Foundation is a founding school partner in Teachers Village, a project that is transforming a neighborhood that had been parking lots and shuttered storefronts by creating a development that encompasses schools, commercial space and affordable housing for educators, including the GO Tutor Corps. We are partnering with developers in

both Bridgeport and Wilmington to create similar developments in those neighborhoods.

- **Pipeline of talent:** The GO Foundation recruits tutors from a national pool of recent college graduates with two goals in mind: 1) to give one year of service tutoring our students to prepare them for college success and 2) to bring talented young educators to cities where they help to seed an education ecosystem as they become classroom teachers, deans, administrators, leaders and advocates for change after their year of service. The recruitment process is very competitive; only one in ten applicants is selected. Approximately one-third of Tutor Corps alumni remain in education in the city where they tutored.
- **Supporting students with special needs:** The GO Foundation has a strong track record of serving students with special needs. Our network serves a higher percentage of students with Individualized Education Programs (IEPs) than our schools' surrounding districts; at our New York City school, more than one-third of students have IEPs. Despite the challenges that this brings, the GO Foundation remains true to our mission to prepare its students to succeed in college. In line with our educational philosophy, this means preparing every student for success – including those who require a range of special education supports and related services – through high academic and behavioral expectations, a strong focus on building relationships and a highly individualized academic program. With the commitment to relationship building and the low adult-to-student ratio that the Tutor Corps model brings, we are uniquely suited to meeting the needs of students with disabilities.

Our schools' greatest areas for growth include:

- **Leadership transition at GO-NYC:** GO-NYC's founding school leader came out of a no-excuses charter high school network and implemented a very strict code of conduct for middle school students. The school board became increasingly concerned about this – especially in the face of high levels of student attrition – and the school leader ultimately resigned. This experience led to many conversations among board members and GOF leadership about the level of discipline needed to maintain strong school culture while still ensuring that we don't lose the hardest to reach students. We've subsequently hired an extremely capable and experienced leader, and updated our code of conduct to achieve a better balance. While we have great confidence in our new leader, the executive transition has been challenging.
- **State test scores at GO-BPT:** Last year, 3% of students were proficient in Math and 11% were proficient in English Language Arts, according to the SBAC. These results, which were on par with our district feeder schools, were sobering and reflect how far we have to go to get our students ready for college

success. We know from the NWEA Map Assessment, administered in late September 2014, that our students were in the lowest 1% of NWEA Map test-takers nationwide. Given our baseline, it will be a steep climb to get students on grade level by 8th grade, and college-ready by high school graduation. Admitting students at the 6th grade level means that the most students enroll several years below grade level. We recognize that it takes more than one school year of high-quality instruction to get these students to grade level. With students growing 1.2 grade levels in Math and 1.8 grade levels in Reading last year, however, we are on track to meet that goal.

- **Recruitment at GO-BPT:** The GO Foundation is committed to recruiting a diverse student body that is representative of the communities we serve. Recruitment efforts overall have been successful, with waiting lists at every school, but we have not been as effective as we'd like at recruiting English Language Learners (ELLs) at GO-BPT. Our goal is for at least 25% of incoming 6th graders to be ELLs, and we are tracking slightly lower. To address this, we are taking steps to forge deeper ties with the Spanish-speaking communities in the city.
- **Attrition at the high school level:** The first class of GO-NWK students are now in 11th grade. This class, which started with 99 students, has dwindled down to 40. Much of this attrition happened during and after the first year of the school; as shown in Attachment C, last year's attrition rate across the network was 10%. However, low retention of our founding class compelled us to examine why students were leaving. GO-NWK is one of the top performing schools in the city, so students are not leaving in search of more rigorous academics. Instead, we concluded that students were leaving for reasons that relate to culture and discipline. We are working hard across our network to build a school culture in which students face consequences for behavior, but are not excessively suspended.

Section 3: Context and Capacity

1. Summarize the organization's capacity to undertake whole-school turnaround. Identify how the organization intends on acquiring the human capital necessary to successfully begin turnaround in August/September 2016.

If awarded Cooke's charter, the GO Foundation will immediately hire several full-time staff members to begin the turnaround work in the months leading up to the formal beginning of the turnaround on July 1, 2016.

- **Launch Director** (January 2016): The Launch Director will oversee student recruitment and turnaround compliance. Once the school year begins, the Launch Director will become the school's Director of Operations, and will be

responsible for non-instructional aspects of the school. S/he will manage daily school operations, including food, transportation, facilities, attendance and visitors to the school. S/he will support the Executive Director in ensuring school's fiscal integrity and compliance with state and federal regulations.

- **Tutor Corps Director** (January 2016): The Tutor Corps Director will support tutor recruitment and assist with onboarding of 39 tutors. Once the school year begins, the Tutor Corps Director will be responsible for supervision of all aspects of the Tutor Corps. They will coach and evaluate tutors, plan and deliver tutor training and professional development and supervise tutor recruitment and retention.
- **(2) Recruitment Associates** (January 2016): Two Recruitment Associates will be responsible for recruiting tutors and staff. Unlike most schools that recruit only a handful of teachers each year, GO schools must also recruit tutors to fulfill our program design of 1 tutor for every 5 student ratio. Recruitment Associates will find top talent by posting jobs online, attending career fairs, participating in on-campus recruitment opportunities, and building relationships with colleges, national nonprofits and education-focused community-based organizations. This team will conduct hundreds of phone screens, assist candidates and track their progress and coordinate in-person interviews.
- **School and Community Engagement Manager:** The U.S. Department of Education identifies backwards mapping from the customer as a key strategy in transforming chronically underperforming schools. Research highlights that ailing organizations of any kind are "out of touch with what their constituents want and need—[they] need to start there." The nature of the Cooke school community indicates a need to ensure current community structures and parent voice are fostered. We intend to employ an experienced educator to serve as a liaison to parents and help ensure programs such as the STS and FHQC are maintained. The educator will have experience in special education, parent-teacher partnerships, and direct experience working with students and families.
- **Executive Director** (January 2016): The GO Foundation will bring in a seasoned Executive Director who will be responsible for the overall success of the school. While we believe it is critical to bring in a talented leadership team as early as possible, we also recognize that the candidates we are interested in will likely be working in schools and will not be available to start with Great Oaks until early summer. We aim to identify and hire an Executive Director by early spring, then bring that person on board in early summer. Key qualifications for the Executive Director include previous experience in a leadership position in a high performing public school, a zeal to educate children, the ability to lead and inspire teachers, experience working with a board, and the capacity to wisely steward the school's resources. Additionally, we aim to identify and hire a Principal for the elementary school to support our upper and lower school structures.

The leadership team at the GO Foundation is gathering resources to identify candidates working in education and in Philadelphia that we believe have the experience and capacity to become part of the school's administration and teaching teams.

Additionally, the GO Foundation will offer interviews to current staff members at Cooke that align to our standards. For teachers, this process involves completing a demonstration lesson with members of the leadership team that is developed by teachers and based on standards within the common core. During the demonstration lesson, teachers will be observed using an instructional rubric to identify instructional strengths and next steps. This process reflects the weekly observation cycle that our current teachers engage in and seeks to provide potential employees with an understanding of how feedback is provided within our schools and to expose them to our approach to teaching and learning.

Successful teaching candidates will have proven success in implementing high-quality instruction that has led to the improvement of student achievement in an urban school. They will possess exceptional relationship building skills and the ability to communicate clearly to multiple stakeholders. The successful candidate will also have:

- A strong academic record with a Bachelor's degree from a competitive college or university required; advanced degree in subject area preferred
- At least two years of experience improving student achievement at an urban school
- State teaching certification in content area (preferred)
- Extremely strong classroom management abilities
- A strong belief that all students can succeed
- A do-whatever-it-takes attitude including a willingness to work occasionally on the weekend or in the evening
- An exceptional ability to respond well to feedback and implement it immediately

Both Mr. Reid and Mr. Duffy have conducted these kinds of vetting and evaluation processes in the turnaround efforts they have led in the past. The GO Foundation's leadership represents a wealth of knowledge of charter school management, academic leadership and financial management. As described above, both Mr. Reid and Mr. Duffy have experience restructuring pedagogy, identifying research based curriculum to address academic shortcomings, and recruiting talented staff to reinforce high academic and behavioral expectations, leading to a drastic decrease in disruptive behaviors, suspensions, and a demonstrable increase in academic performance – in Mr. Reid's case as measured by Philadelphia's 2013-14 School Progress Report; in Mr. Duffy's by City on a Hill's performance on the Massachusetts Comprehensive Assessment System and the renewal of the school's charter.

2. Provide a detailed plan for how the organization will plan, build capacity, and engage stakeholders (parents, students, community members, partner

organizations) during the 2015- 2016 school year if the organization is matched with a school by Winter 2015.

The GO Foundation is committed to partnering with parents to ensure a transition that is successful and reflects the vision parents have for their student's academic experience. We have begun identifying key community leaders that can connect us with parents of the community for future conversations. Our efforts will include parent town halls, after school workshops about our program, school tours to our school in Wilmington, Delaware as well as meetings with our tutors who can best communicate why they have chosen to dedicate a year of service to students in need of support, challenge, and care.

In addition to engaging parents, the GO Foundation is committed to partnering with external stakeholders to ensure the successful turnaround of the school. Since we began undertaking research and due diligence on whether the GO Foundation is well-positioned to enter into the Philadelphia community, our team has met with a number of stakeholders in the community to better understand the landscape in Philadelphia. Our team has met with **Mark Gleason**, Executive Director for the Philadelphia School Partnership (PSP) to gauge PSP's interest in supporting a turnaround; **Lisa Nutter**, the President of Philadelphia Academies on her work and ways that she and her organization might be able to support our students; **Pam Hansen**, the team leader for non-profit lending and **Marguerite Mugge**, head of education lending at M&T Bank to discuss opportunities to finance the renovation of the current school facility; the **Rev. Bill Golderer**, who leads the Broad Street Ministry, **Amy Ruck Kagan**, Executive Director of Philadelphia Charters for Excellence to gain insight into the charter school landscape in Philadelphia; **Sean Buffington**, the past President of University of the Arts, who is now the Vice President of the Henry Luce Foundation; **Jim Savoie**, Associate Provost and Dean at the University of the Arts, on opportunities at UArts; **Alex Kaplan** and **Ken Tomlinson**, of the NextFab business incubation and prototyping center, on opportunities for students; **Darryl Bundrige**, Executive Director of City Year Philadelphia, to discuss service in Delaware; Professor **Anna Beresin** who teaches at Penn and UArts on opportunities that she might lead to connect students to the arts in Philadelphia; State Representative **Jordan Harris**, **Mason Lane**, the Chief of Staff to State Representative Brian Sims; **Richard Vague**, serial entrepreneur and managing partner at Gabriel Investments and President of the Philadelphia Live Arts and Fringe Festival, on the climate for non-profits in Philadelphia. Additionally, we have conferred with **Ellen Rosenberg**, **David Mercuris** and **Seth Shapiro** from The Goldenberg Group about the creative ways they have partnered with other Philadelphia public schools, and discussed creating a similar relationship that might also include offering their professional assistance in securing housing for our tutors.

These conversations represent the beginning of many conversations that would be undertaken as a part of the GO Foundation's process of better understanding the specific needs of Cooke. If chosen to lead the turnaround, Great Oaks would conduct

extensive outreach to Cooke staff, students and families, as part of developing a full turnaround plan for the school.

3. Provide a plan that details the year over year gains and progress improvements that will be made, with specific details on percentage gains per year for children. Describe how the organization will report outcomes and metrics on a regular basis.

Our academic plan will target 100% of students proficient within five years – the length of the initial charter. The most recent available SDP data is listed below and was used to determine year benchmarks for the PSSA to determine our progress towards our five-year goal.

	2013-2014		2014-15		2015-16		2016-17		2017-18		2018-19	
Grade	Math	Reading	Math	Reading	Math	Reading	Math	Reading	Math	Reading	Math	Reading
3	21%	20%	37%	35%	52.60%	50%	68.40%	65%	84.20%	82%	100%	97%
4	42%	39%	51%	50%	63%	63%	75%	76%	88%	87.80%	100%	100%
5	17%	13%	34%	30%	51%	47%	67%	65%	83%	82%	100%	100%
6	32%	14%	46%	31%	60%	48%	75%	66%	85%	83%	100%	100%
7	51%	39%	60%	50%	70%	63%	80%	76%	90%	87.80%	100%	100%
8	63%	48%	70%	58%	77%	68%	84%	79%	93%	89%	100%	100%

At the GO Foundation, data is used to drive every decision – from tutor grouping to full class instruction. In addition to analyzing the PSSA data, the GO Foundation will use an array of high-quality assessment tools, both formative and summative, to determine, monitor and report individual student, cohort and school progress over time. Examples will include:

- Quarterly Internal Benchmarks to assess quality teaching, target PD, and create plans for reteach
- Diagnostic Benchmarking – including the F & P assessment, 4sight Benchmark assessment and NWEA MAP assessment
- Yearly State Testing (PSSA)

A cycle of assessments will enable the school teams to continually identify the needs of our students early in the school year, and on an ongoing basis. This means that students who are at-risk of academic failure will receive ongoing tutoring specifically targeted to their ability level in groups of 1-4 students.

Teachers and tutors will receive extensive professional development related to using data to inform the delivery of instruction, identifying student needs and differentiating instruction accordingly to maximize student achievement. Our plan for an instructional

team is expansive and includes a team with two Directors of Curriculum and Instruction. All teachers will receive pre-service, common planning time and weekly professional development, including presentations by consultants, coaching by content specialists and peer development of curriculum strategies. Intensive PD will ensure that teachers are supported in their lesson planning and skilled at implementing differentiated instruction.

The GO Foundation defines success as having prepared 100% of our students for college graduation. Recognizing the intensive needs of Cooke, we have established goals that will allow us to remediate the performance of all students over five years. We have established leading indicators that will confirm we are on track for success and ensuring our students are truly college ready. Leading indicators for success include:

- Enroll at least 500 students in grades K through 8 annually
- Recruit 39 recent college graduates to join the Tutor Corps annually
- Recruit (or retain) 20 highly-effective classroom teachers annually
- Operate with a balanced budget annually
- Increase Reading and Math Proficiency to 100% over five years as determined by charter agreement (see chart)
- 100% of students reading at grade level by grade 4
- 95% student attendance rate each school year
- 95% student retention each school year
- Parent satisfaction of 95% annually

The lagging indicator of success that we will track is college graduation; that is, what percentage of graduates successfully obtain a Bachelor's degree and how long does it take them to complete it.

4. Describe how the organization plans to engage the Cooke school community after being matched to a school and in advance of school opening.

Our most recent school launch in Wilmington was tremendously successful, primarily because we hired a Launch Director who served as a liaison to the community as parents prepared to enroll their students in a new school. Launch Directors play a key role in answering questions, organizing student logistics, and helping parents feel supported in an unfamiliar process. It is our goal to use our budding relationships in the Cooke community to engage parents so we are able to gather the concerns and voices of the neighborhood. Our vision is to learn about the Cooke school community while sharing ours as they relate to our various schools. Our efforts will include parent town halls, after school workshops about our program, school tours to our school in Wilmington, Delaware as well as meetings with our tutors who can best communicate why they have chosen to dedicate a year of students to students in need of support, challenge, and care. In addition to this, we plan to employ a parent and community engagement member who can attend to the needs of parents and serve as a liaison in the process of school conversion.

Section 4: Budget

Provide the budget for a school the organization currently operates within a turnaround context and complete the budget template (Attachment D) for the school the organization is proposing to operate.

A foundational element for the school's success will be careful management of its resources. The GO Foundation's CFO is responsible for producing a comprehensive set of monthly financial statements in order to monitor and track the financial health of the school. In addition to a balance sheet, operating statement and variance analysis, the CFO will regularly distribute a high level dashboard in order to highlight and monitor important financial metrics to the finance committee and school board as a whole. The school's finance committee, generally comprised of the school's Executive Director, GO Foundation's CFO, Board Chair, and Board Treasurer will meet monthly in advance of the full board meeting to discuss finance-specific matters in-depth.

The GO Foundation's CFO will also be responsible for leading the annual budgetary planning cycle along with the school's Executive Director. Such planning will take into account not only the annual cycle, but also a long-range plan that demonstrates to the Board the overall sustainability of the school's proposed revenue projections and cost structure. The GO Foundation is prepared to enlist the assistance of OmniVest in order to provide operational support for transaction processing, along with compliance with Pennsylvania statutes and regulations.

Finally, the GO Foundation's CFO will prepare a complete set fiscal policies to be reviewed and approved by the finance committee and school board in order to ensure that the controls in place at the school promote integrity with regard to financial matters and protect the interests of the school's various stakeholders.

Please see Attachment D to view the proposed five-year budget.



Brief Narrative of explanation for not submitting an M/WBE Participation Plan

As an organization that has not previously done business in the state of Pennsylvania, the Great Oaks Foundation has not entered into any contracts with Minority and Woman-Owned Businesses (M/WBE's) in the Philadelphia Metropolitan Statistical Area. If awarded the "Cooke" charter, the Great Oaks Foundation is committed to meeting the range of participation outlined in the RFQ of 5%-10%.

RFQ-151 ORIGINAL COPY

ATTACHMENT C

Track Record of Student Success

Provide the specific detailed information requested for each of the sections (a) through (g) below.

4. List the schools currently operated by your organization. Please provide school name, grade configuration, location, number of years under your management, and indicate whether the school is a turnaround.

Name: Great Oaks Charter School - Newark

Grade Configuration: 6-11 (6-12 at scale)

Location: Newark, NJ

Number of Years Under Great Oaks Management: 5

Turnaround: No

Name: Great Oaks Charter School – New York City

Grade Configuration: 6-8 (6-12 at scale)

Location: New York City, NY

Number of Years Under Great Oaks Management: 3

Turnaround: No

Name: Great Oaks Charter School - Bridgeport

Grade Configuration: 6-7 (6-12 at scale)

Location: Bridgeport, CT

Number of Years Under Great Oaks Management: 2

Turnaround: No

Name: Great Oaks Charter School - Wilmington

Grade Configuration: 6 (6-12 at scale)

Location: Wilmington, DE

Number of Years Under Great Oaks Management: 1

Turnaround: No

Key contextual elements of the schools, all of which are operated outside Pennsylvania, are outlined below:

Great Oaks Charter School – Newark: At GO-NWK, 83% of students are Black and 17% are Latino. 80% are eligible for free and reduced-price lunch. 12% of the population has an IEP. The standardized test used is the PARCC Assessment. The school was authorized by, and is accountable to, the New Jersey Department of Education. School Board of Trustees contracts with Great Oaks Foundation to form a management agreement. The management agreement is renewed annually. The school's Executive Director reports directly to the Board of Trustees.

Great Oaks Charter School - New York City: At GO-NYC, 29% of students are Black, 40% are Latino, 29% are Asian and 2% are White. 85% are eligible for free and reduced-price lunch. 35% of the population has an IEP. The standardized test used is the PARCC Assessment. The school was authorized by, and is accountable to, the New York State Department of Education – Board of Regents. School Board of Trustees contracts with Great Oaks Foundation to form a management agreement. The management agreement is renewed annually. The school’s Executive Director reports directly to the Board of Trustees.

Great Oaks Charter School - Bridgeport: At GO-BPT, 56% of students are Black, 13% are Latino, 29% are Multi-racial and 2% are White. 85% are eligible for free and reduced-price lunch. 11% of the population has an IEP. The standardized test used is the SBAC Assessment. The school was authorized by, and is accountable to, the Connecticut State Department of Education. School Board of Trustees contracts with Great Oaks Foundation to form a management agreement. The management agreement is renewed annually. The school’s Executive Director reports directly to the Board of Trustees.

Great Oaks Charter School - Wilmington: At GO-WIL, 76% of students are Black, 15% are Latino, 6% are Multi-racial and 3% are White. 85% are eligible for free and reduced-price lunch. 18% of the population has an IEP. The standardized test used is the SBAC Assessment. The school was authorized by, and is accountable to, the Delaware Department of Education. School Board of Trustees contracts with Great Oaks Foundation to form a management agreement. The management agreement is renewed annually. The school’s Executive Director reports directly to the Board of Trustees. GO-WIL is in its first year of operation and therefore has not administered any standardized assessments.

5. Provide PSSA/Keystone test data or relevant state outcomes (percent proficient and above for reading and math) using the template below for **all** grades served by **each** charter school currently operated by your organization.

Great Oaks Charter School - Newark		
Year	Test Data	
	Percent Proficient or Above- Reading (by Grade)	Percent Proficient or Above- Math (by Grade)
2012-13	6 th Grade – 49.4%	6 th Grade – 90.6%
	7 th Grade – 55.6%	7 th Grade – 63.5%
	8 th Grade – 64.6%	8 th Grade – 70.8%
2013-14	6 th Grade – 42%	6 th Grade – 86%
	7 th Grade – 51%	7 th Grade – 77%
	8 th Grade – 70%	8 th Grade – 77%
2014-15	6 th Grade – TBD	6 th Grade – TBD
	7 th Grade – TBD	7 th Grade – TBD

8th Grade – TBD

8th Grade – TBD

Great Oaks Charter School – New York City

Year	Test Data	
	Percent Proficient or Above- Reading (by Grade)	Percent Proficient or Above- Math (by Grade)
2013-14	6 th Grade – 25%	6 th Grade – 55%
2014-15	6 th Grade – 14.1%	6 th Grade – 21.5%
	7 th Grade – 37.4%	7 th Grade – 55.7%

Great Oaks Charter School – Bridgeport

Year	Test Data	
	Percent Proficient or Above- Reading (by Grade)	Percent Proficient or Above- Math (by Grade)
2014-15	6 th Grade – 11%	6 th Grade – 3%

6. List below the number of serious incidents at **each** of your charter schools for the years indicated. For the purpose of this response a “serious incident” is defined as one of the following: assault, drugs, moral offenses, weapons, and theft. State the number of expulsions, by year, at each school.

Please see the below chart.

3. List below the number of suspensions, disaggregated by in-school and out-of-school, at **each** of your charter schools for the years indicated.

Please see the below chart.

4. List below student retention rates at **each** of your charter schools for the years indicated. Provide both year-to-year retention as well as within year retention. Year-to-year retention considers the number of active students at a school on the last day of the academic year who return to the same school the following year (do not include students in terminal grades in this calculation). Within year retention considers the students who stay an entire academic year at the school.

Please see the below chart.

5. Attendance rates over a five-year period of time at **each** of your charter schools for the years indicated.

Please see the below chart.

6. Graduation rates (if applicable) at **each** of your charter schools for the years indicated. Graduation rates are defined as the percentage of entering 9th graders in a school that graduate within six years of starting 9th grade.

Please see the below chart.

Great Oaks Charter School - Newark						
Year	Serious Incidents	Suspensions		Retention Rate	Attendance Rate	Graduation Rate
		In	Out			
2012-13	0	*	72	86%	94%	N/A
2013-14	0	*	105	87%	94%	N/A
2014-15	0	*		90%	94%	N/A

Great Oaks Charter School – New York City						
Year	Serious Incidents	Suspensions		Retention Rate	Attendance Rate	Graduation Rate
		In	Out			
2013-14	0	48	52	84%	96%	N/A
2014-15	0	*	17	86%	96%	N/A

Great Oaks Charter School – Bridgeport						
Year	Serious Incidents	Suspensions		Retention Rate	Attendance Rate	Graduation Rate
		In	Out			
2014-15	0	25	125	93%	93%	N/A

*This data could not be produced given the brevity of the time period to assemble this proposal

**THE SCHOOL DISTRICT OF PHILADELPHIA
EDUCATION CENTER
OFFICE OF PROCUREMENT SERVICES
440 N. BROAD STREET, THIRD FLOOR
PHILADELPHIA, PENNSYLVANIA 19130**

**TELEPHONE (215) 400-4380
FAX (215) 400-4381**

November 25, 2015

ADDENDUM #4

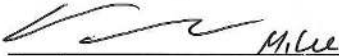
QUALIFICATION NUMBER: RFQ-151 - Cooke
QUALIFICATION NAME: Renaissance Charter Schools Initiative - Cooke
QUALIFICATION OPENING DATE: November 30, 2015

You are receiving this announcement because you recently downloaded a copy of RFQ-151, "Renaissance Charter Schools Initiative - Cooke" from the School District of Philadelphia's Procurement website.

- The following page contains questions submitted by bidders in writing, as well as the District's responses.

ALL OTHER TERMS AND CONDITIONS REMAIN UNCHANGED.

Thank you,



Marvin Lee
Director, Procurement Services

Please sign, date and return this Addendum with your response, as it now becomes a part of the Proposal.

AUTHORIZED SIGNATURE

FIRM NAME (PRINT)

DATE

RFQ-151 Addendum #4
Page 1 of 2

THE SCHOOL DISTRICT OF PHILADELPHIA
REQUEST FOR QUALIFICATION - NUMBER 151
RENAISSANCE CHARTER SCHOOLS INITIATIVE - COOKE
VENDOR QUESTIONS & ANSWERS
NOVEMBER 25, 2015

QUESTION 1:

Most recent school performance data?

ANSWER:

The School District of Philadelphia has not released 2014-15 student outcomes yet.

QUESTION 2:

School enrollment configuration?

ANSWER:

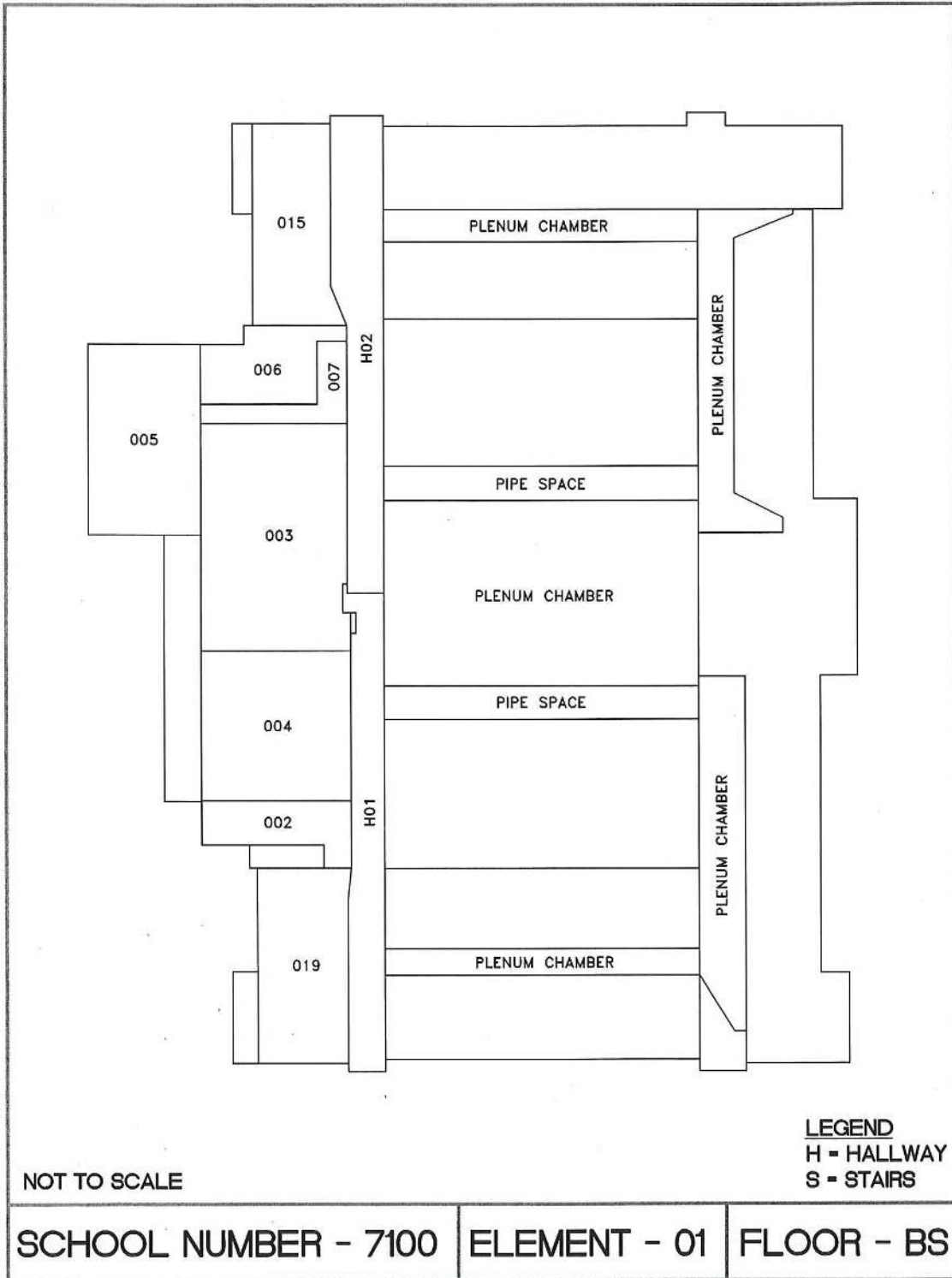
As of October 1, 2015, Cooke had approximately 500 students, of which approximately 60 were students with special needs.

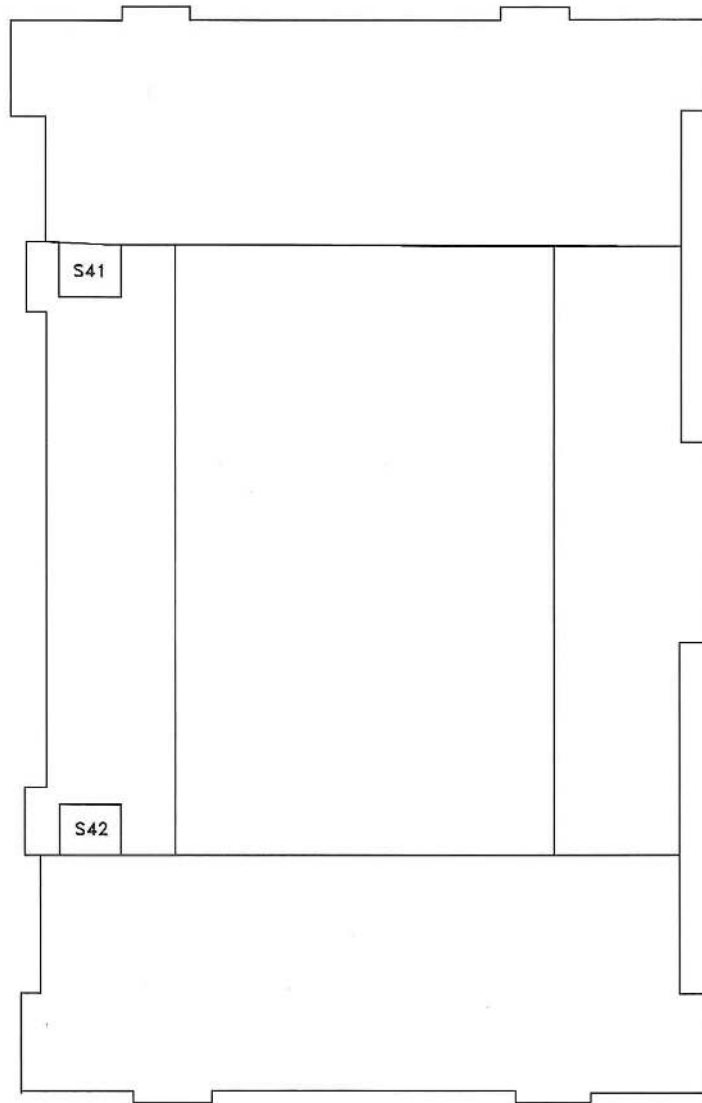
QUESTION 3:

Blueprint?

ANSWER:

A floor plan is attached.





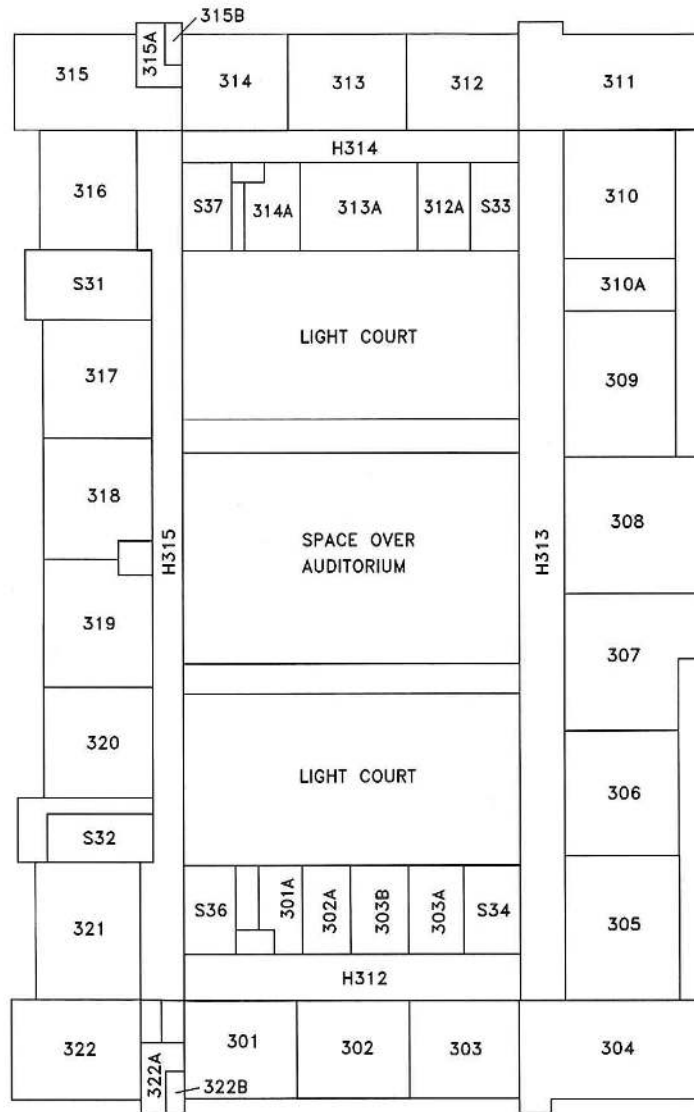
NOT TO SCALE

LEGEND
H = HALLWAY
S = STAIRS

SCHOOL NUMBER - 7100

ELEMENT - 01

FLOOR - AT



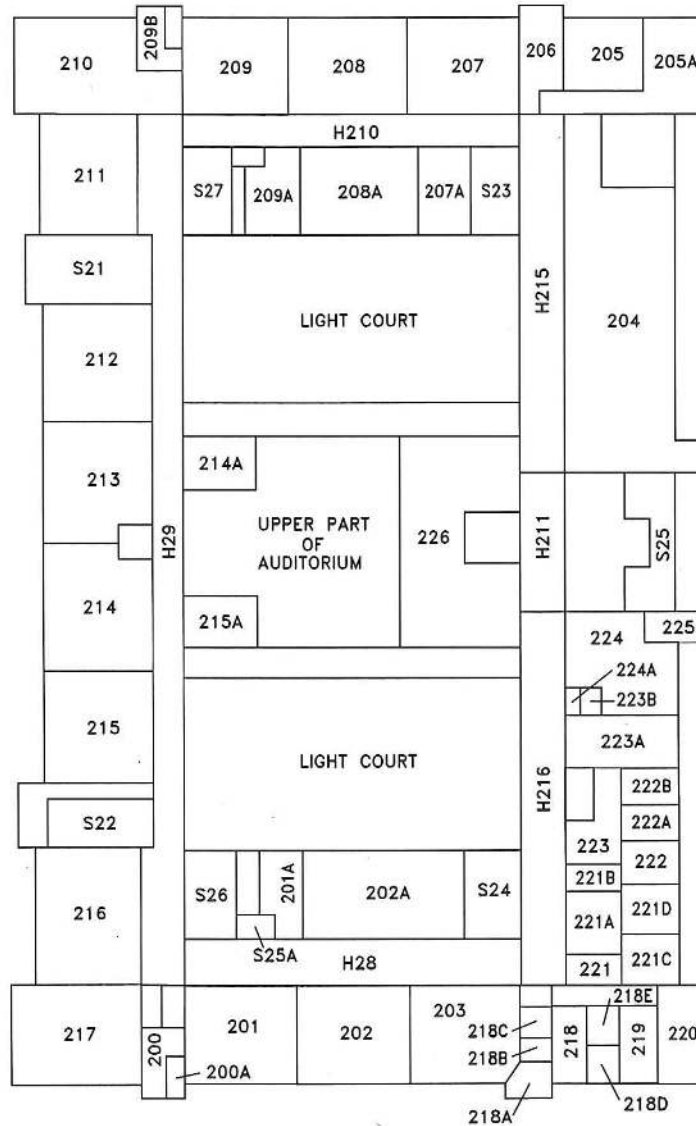
NOT TO SCALE

LEGEND
 H - HALLWAY
 S - STAIRS

SCHOOL NUMBER - 7100

ELEMENT - 01

FLOOR - 03



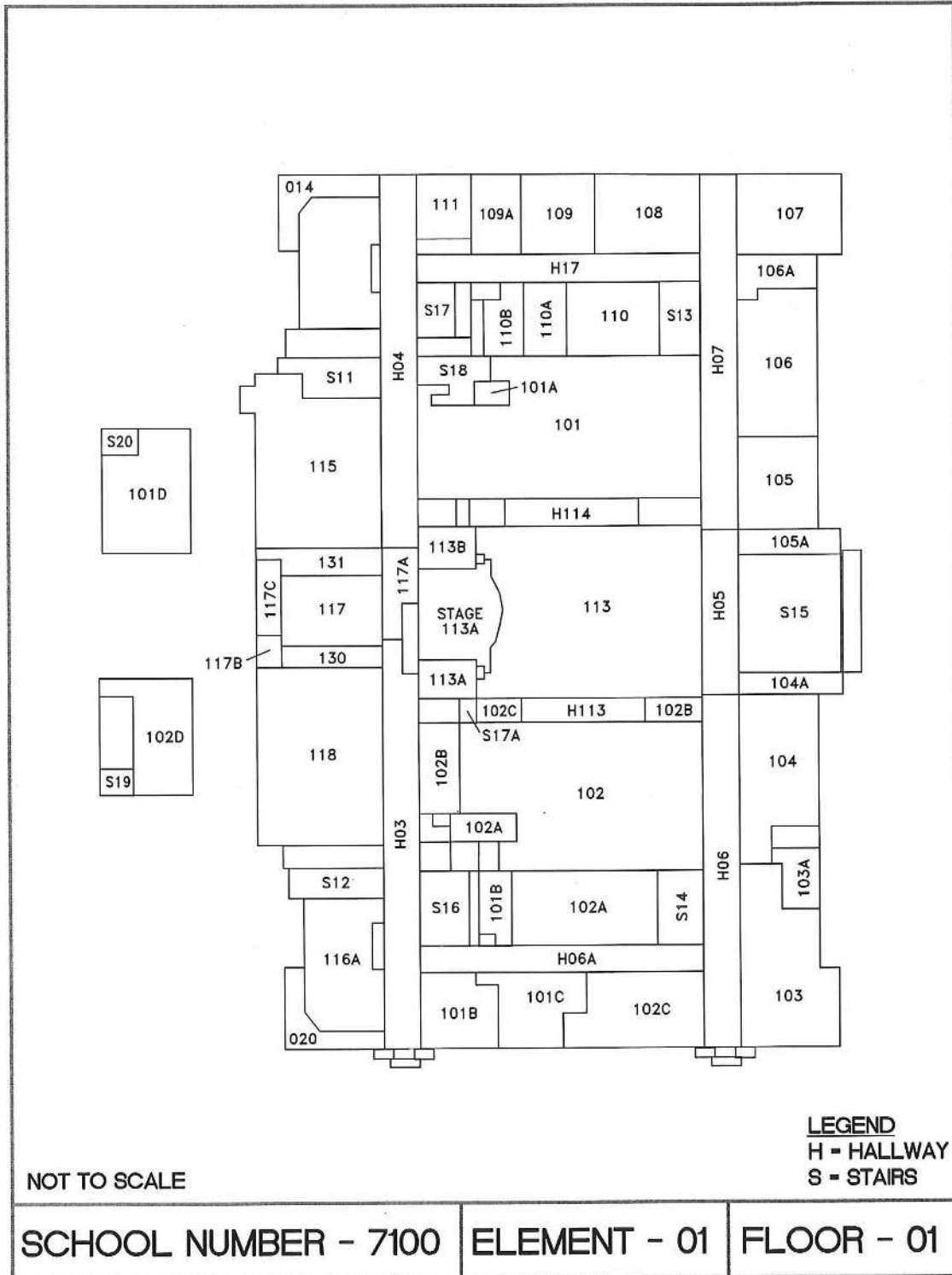
NOT TO SCALE

LEGEND
H - HALLWAY
S - STAIRS

SCHOOL NUMBER - 7100

ELEMENT - 01

FLOOR - 02



THE SCHOOL DISTRICT OF PHILADELPHIA
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440 N. BROAD STREET, THIRD FLOOR
PHILADELPHIA, PENNSYLVANIA 19130

TELEPHONE (215) 400-4380
FAX (215) 400-4381

November 17, 2015

ADDENDUM #3

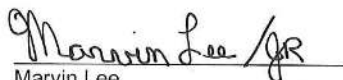
QUALIFICATION NUMBER: RFQ-151
QUALIFICATION NAME: Renaissance Charter Schools Initiative - Cooke
QUALIFICATION OPENING DATE: November 18, 2015

You are receiving this announcement because you recently downloaded a copy of RFQ-151, "Renaissance Charter Schools Initiative – Cooke" from the School District of Philadelphia's Procurement website.

- On Addendum #1 that was issued November 2, 2015, please correct downloaded a copy of RFQ-153, to read "**downloaded a copy of RFQ-151**"
- On Addendum #2 that was issued November 16, 2015, please correct downloaded a copy of RFQ-153, to read "**downloaded a copy of RFQ-151**"
- **RFQ Responses Due – November 30th, 2015**
- **Qualified finalists notified – Week of January 4th, 2016**

ALL OTHER TERMS AND CONDITIONS REMAIN UNCHANGED.

Thank you,


Marvin Lee
Director, Procurement Services

Please sign, date and return this Addendum with your response, as it now becomes a part of the Proposal.

AUTHORIZED SIGNATURE

FIRM NAME (PRINT)

DATE

RFQ-151 Addendum #3

**THE SCHOOL DISTRICT OF PHILADELPHIA
EDUCATION CENTER
OFFICE OF PROCUREMENT SERVICES
440 N. BROAD STREET, THIRD FLOOR
PHILADELPHIA, PENNSYLVANIA 19130**

**TELEPHONE (215) 400-4380
FAX (215) 400-4381**

November 16, 2015

ADDENDUM #2

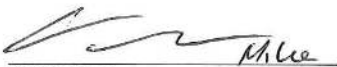
QUALIFICATION NUMBER: RFQ-151
QUALIFICATION NAME: Renaissance Charter Schools Initiative - Cooke
QUALIFICATION OPENING DATE: November 18, 2015

You are receiving this announcement because you recently downloaded a copy of RFQ-153, "Renaissance Charter Schools Initiative – Cooke" from the School District of Philadelphia's Procurement website.

- RFQ Responses Due – November 30th, 2015
- Qualified finalists notified – Week of January 4th, 2016

ALL OTHER TERMS AND CONDITIONS REMAIN UNCHANGED.

Thank you,



Marvin Lee
Director, Procurement Services

Please sign, date and return this Addendum with your response, as it now becomes a part of the Proposal.

AUTHORIZED SIGNATURE

FIRM NAME (PRINT)

DATE

RFQ-151 Addendum #2

**THE SCHOOL DISTRICT OF PHILADELPHIA
EDUCATION CENTER
OFFICE OF PROCUREMENT SERVICES
440 N. BROAD STREET, THIRD FLOOR
PHILADELPHIA, PENNSYLVANIA 19130**

**TELEPHONE (215) 400-4380
FAX (215) 400-4381**

November 2, 2015

ADDENDUM #1

QUALIFICATION NUMBER: RFQ-151
QUALIFICATION NAME: Renaissance Charter Schools Initiative - Cooke
QUALIFICATION OPENING DATE: November 18, 2015

You are receiving this announcement because you recently downloaded a copy of RFQ-153, "Renaissance Charter Schools Initiative – Cooke" from the School District of Philadelphia's Procurement website.

- The following pages contain questions submitted by bidders in writing, as well as the District's responses.

RFQ-151 Addendum #1
Page 1 of 3

THE SCHOOL DISTRICT OF PHILADELPHIA
REQUEST FOR QUALIFICATION - NUMBER 151
RENAISSANCE CHARTER SCHOOLS INITIATIVE
COOKE
VENDOR QUESTIONS & ANSWERS
OCTOBER 30, 2015

QUESTION 1:

How are students counted for reimbursement?

ANSWER:

All charter schools are required to use the School District of Philadelphia's student information system to record up-to-date and accurate student enrollment information. Charter schools are paid based on the number of days that each student is enrolled in the school.

QUESTION 2:

Where do we find a list of qualified WMBE participants?

ANSWER:

Please contact Small Business Development at (215) 400-4390

QUESTION 3:

How much rent will we pay at each school?

ANSWER:

There is no cost to rent space in the school. A license agreement will be established for each Renaissance Charter School. Depending on the school and operator, the license agreement may include the cost of utilities, trash pickup, snow removal, cleaning services, and engineering services.

QUESTION 4:

Is there a set management fee?

ANSWER:

No.

QUESTION 5:

Is there a guaranteed number of students per school?

ANSWER:

No. Renaissance Charter Schools are neighborhood schools and pull only students from the existing catchment.

QUESTION 6:

Will there be an opportunity to tour the facilities?

ANSWER:

There can be arrangements made for potential operators to visit the school(s).

QUESTION 7:

Is the building lease double net or triple net?

ANSWER:

See answer to question 3.

QUESTION 8:

What is our autonomy in selecting staff?

ANSWER:

Charter schools are able to select staff autonomously. The Pennsylvania Department of Education has guidance on the qualification and certification levels that are required.

QUESTION 9:

Do we have to pull staff from a pre-screen district personnel file?

ANSWER:

No.

QUESTION 10:

Are there existing school budgets that we can use as a template?

ANSWER:

The School District of Philadelphia's Budget website (<http://webgui.phila.k12.pa.us/offices/b/budget/>) may serve as a potential resource.

QUESTION 11:

If a management company is interested in submitting a response for all three schools do they have to have three separate responses?

ANSWER:

Yes. Each response must be specific to the school and should take into consideration the unique contexts of each school.

ALL OTHER TERMS AND CONDITIONS REMAIN UNCHANGED.

Thank you,



Marvin Lee
Director, Procurement Services

Please sign, date and return this Addendum with your response, as it now becomes a part of the Proposal.

AUTHORIZED SIGNATURE

FIRM NAME (PRINT)

DATE

APPENDIX E:

SIGNATURE PAGE

DATE: October 23, 2015PROPOSAL NO.: RFQ-151DATE OF PROPOSAL OPENING: November 18, 2015TIME OF PROPOSAL OPENING: 11:00 AM (EST)

PLEASE DIRECT ANY QUESTIONS REGARDING THIS RFQ TO:

NAME: David B. Lazarow, CPPB

E-MAIL : dblazarow@philasd.orgPROPOSAL INVITATION FOR: RENAISSANCE CHARTER SCHOOLS INITIATIVE - COOKE

OFFER: The undersigned hereby offers to sell to the School District of Philadelphia the commodities or services indicated in the following pages of this RFQ at the price(s) quoted, in complete accordance with all conditions, specifications, and Terms and Conditions set forth herein. All proposals shall remain valid for a period of 180 days from the Proposal Due Date.

COMPANY

NAME: Great Oaks Foundation

ADDRESS: 222 Broadway, 19th Floor
New York, NY 10038
(CITY) (STATE) (ZIP)

TELEPHONE: 917-239-3641 FAX: N/A

AUTHORIZED

SIGNATURE: _____
NAME TITLE

This document must be signed by a person who is authorized to legally obligate the proposing vendor. A signature on this document indicates that all School District of Philadelphia terms and conditions are accepted by the proposing vendor and that any and all other terms and conditions submitted by the vendor are null and void, even if such terms and conditions have terminology to the contrary. The signature also certifies that there have been no alterations or substitutions of any of the RFQ documents.

ATTACHMENT D

**SCHOOL DISTRICT OF PHILADELPHIA
PROPOSED RENAISSANCE CHARTER SCHOOL
DETAILED YEAR 1 (2016-2017) BUDGET - BENEFITS FORM**

APPLICANT: Great Oaks Foundation, inc.

SCHOOL: Cooke (7100)

REVENUES					TOTAL
1	SDP Funding (Per Pupil Payments)				
2	Regular Education				\$3,577,635
3	Special Education				\$1,928,526
4	Total SDP Funding (Per Pupil Payments)				\$5,506,161
5	Federal Funding (Title Funding, IDEA, Other)				
6	Title Funding				\$159,000
7	IDEA				\$40,000
8					
9					
10	Total Federal Funding				\$199,000
11	State Funding (PSERS/FICA Reimbursement, Grants, etc.)				
12	PSERS				\$266,733
13	Health Subsidy				\$6,000
14					
15					
16	Total State Funding				\$272,733
17	Other Funding (Fundraising, Contributions, Grants, Lines of Credit, Loans, etc.)				
18					
19					
20					
21					
22	Total Other Funding				\$0
23					
24	TOTAL REVENUES / SOURCE OF FUNDS				\$5,977,894

EXPENDITURES*		FTEs	AVERAGE SALARY	TOTAL SALARY	TOTAL BENEFITS	TOTAL
Personnel Services (100/200)						
Administration						
25	Executive Director	1.0	\$110,000	\$110,000	\$45,421	\$155,421
26	Instructional Management	1.0	\$94,000	\$94,000	\$38,814	\$132,814
27	Directors, Deans, and Coordinators	8.0	\$68,250	\$546,000	\$225,454	\$771,454
28	Admin Staff	2.0	\$29,000	\$58,000	\$23,949	\$81,949
29				\$0		\$0
30	Total Administration	12.0		\$808,000	\$333,639	\$1,141,639
31						
32	Instruction					
33	Classroom Teachers - Regular	20.0	\$51,375	\$1,027,500	\$424,274	\$1,451,774
34	Classroom Teachers - SpED	3.0	\$59,000	\$177,000	\$73,087	\$250,087
35				\$0		\$0
35				\$0		\$0
36				\$0		\$0
36	Total Instruction	23.0		\$1,204,500	\$497,361	\$1,701,861
37						
37	Instructional Support					
38	Tutor Corps Staff	7.0	\$12,000	\$84,000	\$34,685	\$118,685
38	Tutors	59.0	\$7,000	\$413,000	\$170,536	\$583,536
39				\$0		\$0
39				\$0		\$0
40				\$0		\$0
40	Total Instructional Support	66.0		\$497,000	\$205,221	\$702,221
41						
41	Health and Safety					
42	Social Worker	1.0	\$52,000	\$52,000	\$21,473	\$73,473
42				\$0		\$0
43				\$0		\$0
43				\$0		\$0

44				\$0		\$0
44	Total Health and Safety	1.0		\$52,000	\$21,473	\$73,473
45						
45	Substitute Services					
46	Extracurricular Activities / Overtime					
46	Professional Development / Training					
47						\$0
47						\$0
48						\$0
48						\$0
49	Total Other	0.0		\$0	\$0	\$0
49						
50	Total Personnel Services	102.0		\$2,561,500	\$1,057,693	\$3,619,193
Purchased Professional And Technical Services (300)						
51	Audit					\$16,000
52	Payroll					\$15,000
53	Technology					\$30,000
54	Great Oaks Management Fee					\$550,616
55						
56						
57	Total Purchased Professional And Technical Services					\$611,616
Purchased Property Services (400)						
58						
59						
60						
61						

62						
63						
64	Total Purchased Property Services					\$0
Other Purchased Services (500)						
65	Staff Recruitment					\$10,000
66	Student Recruitment					\$20,000
67	Professional Development					\$50,000
68						
69						
70						
71	Total Purchased Other Services					\$80,000
Supplies (600)						
72	Textbooks, Workbooks, Classroom Supplies					\$135,000
73	Student Testing and Assessments					\$40,000
74	Office Expense and Copiers					\$85,000
75	Student/Staff Uniforms					\$25,000
76	Student Activities and Field Trips					\$55,000
77	Other					\$30,000
78	Total Supplies					\$370,000
Property (700)						
79	Rent, Utilities, and Insurance					\$346,000
80	Janitorial					\$265,500
81	Repair and Maintenance					\$106,200
82	Depreciation					\$75,000
83	Other					\$30,000
84						
85	Total Property					\$822,700

Other (800/900)						
86	Tutor Housing Costs					\$460,800
87						
88						
89						
90						
91	Total Other					\$460,800
92	TOTAL ALL EXPENDITURES					\$5,964,309

ENDING BALANCE						\$13,585
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**Please reference the Pennsylvania State Chart of Accounts for information regarding categorization of various expenditures.*

RFQ-151 ORIGINAL

ATTACHMENT D

**SCHOOL DISTRICT OF PHILADELPHIA
PROPOSED RENAISSANCE CHARTER SCHOOL
DETAILED YEAR 1 (2016-2017) BUDGET - BENEFITS FORM**

APPLICANT: Great Oaks Foundation, Inc.

SCHOOL: Cooke (7100)

FRINGE BENEFITS		SALARIES	RATE	TOTAL
	FICA and Unemployment			
	FICA Social Security	\$2,561,500	6.20%	\$158,813
	FICA Medicare	\$2,561,500	1.45%	\$37,142
	Federal Unemployment Tax (FUTA)	\$2,561,500	0.50%	\$12,808
	PA Unemployment Compensation Tax	\$2,561,500	0.50%	\$12,808
	Insurance	Headcount	Rate	
		36	7,500	\$270,000
		22	2,000	\$43,560
				\$0
				\$0
				\$0
	Retirement			
	PSEERS Contribution	\$2,064,500	25.84%	\$533,467
	Other			\$0
	Other			
	Tuition Reimbursement			\$0
				\$0
				\$0
TOTAL BENEFITS		\$2,561,500		\$1,068,597
CALCULATED BENEFITS RATE				41.7176%

ATTACHMENT D

**SCHOOL DISTRICT OF PHILADELPHIA
PROPOSED RENAISSANCE CHARTER SCHOOL
FIVE-YEAR BUDGET**

APPLICANT:

SCHOOL:

	FY2016-17	FY2017-18	FY2018-19	FY2019-20	FY2020-21
Projected Enrollment - Regular Education (Non-Special Educ.)	450	470	495	520	545
Projected Enrollment - Special Education	80	83	88	92	96
Projected Enrollment - Total	530	553	583	612	641

REVENUES / SOURCES OF FUNDS

SDP Funding	\$5,506,161	\$5,794,861	\$6,178,518	\$6,544,431	\$6,917,045
Federal Funding	\$199,000	\$207,400	\$218,900	\$229,600	\$240,300
State Funding	\$272,733	\$286,070	\$300,073	\$314,777	\$330,216
Other Funding	\$0	\$0	\$0	\$0	\$0
TOTAL REVENUES / SOURCES OF FUNDS	\$5,977,894	\$6,288,331	\$6,697,491	\$7,088,808	\$7,487,561

EXPENDITURES

Personnel Services					
Salaries	\$2,561,500	\$2,711,930	\$2,860,874	\$3,014,724	\$3,174,437
Benefits	\$1,057,693	\$1,119,809	\$1,181,310	\$1,244,838	\$1,310,787
Total Personnel Services	\$3,619,193	\$3,831,739	\$4,042,184	\$4,259,562	\$4,485,223
Contracted Services	\$611,616	\$641,706	\$678,852	\$715,443	\$752,704
Property Services	\$0	\$0	\$0	\$0	\$0
Other Services	\$80,000	\$84,000	\$88,200	\$92,610	\$97,241
Books and Supplies	\$370,000	\$388,500	\$407,925	\$428,321	\$449,737
Equipment	\$822,700	\$834,854	\$847,251	\$859,896	\$872,794
Other Services	\$460,800	\$470,016	\$517,807	\$556,816	\$596,204
TOTAL EXPENDITURES	\$5,964,309	\$6,250,815	\$6,582,219	\$6,912,648	\$7,253,903

Excess (Deficiency) Revenues and Proceeds Over (Under) Expenditures and Other Uses	\$13,585	\$37,516	\$115,272	\$176,160	\$233,657
Fund Balance - July 1		\$13,585	\$51,101	\$166,373	\$342,533

Fund Balance- June 30	\$13,585	\$51,101	\$166,373	\$342,533	\$576,190
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