

APPENDIX A: 2014-15 CHARTER SCHOOL ANNUAL REPORT

PART 1: SCHOOL INFORMATION AND EXECUTIVE SUMMARY	
Name of Charter School:	Year School Opened:
Great Oaks Charter School	2014
Street Address:	City/Zip Code:
510 Barnum Avenue	Bridgeport, CT 06608
School Director:	School Director Contact Information:
Monica Maccera Filppu	mmaccera@greatoakscharter.org /203 870-8188
Grades Authorized to Serve in 2014-15:	Charter Term:
6	2014-2019
<p>1. Executive Summary: Provide a cover letter or executive summary highlighting school progress, performance, accomplishments, and major changes during the 2014-15 school year. Include a brief narrative on the school’s unique model and student population.</p>	
<p>The Connecticut State Board of Education approved the charter application for Great Oaks Charter School of Bridgeport on April 2, 2014. The school opened in August of 2014 with 125 sixth grade students. As described in Part 4 below, the student population of Great Oaks Bridgeport is representative of the diversity of students in Bridgeport Public Schools. One hundred percent of students are Bridgeport residents. They come from a wide distribution of Bridgeport Schools including traditional neighborhood schools, magnet schools and other charter schools.</p> <p>The hallmark of the Great Oaks model is the tutorial program staffed by members of the Great Oaks Tutor Corps. Great Oaks provides small group instruction to all students for two periods a day. Students are placed in tutorial groups of 1-4 based on their specific learning needs identified through the NWEA MAP assessment. Tutors specialize in either Math or ELA so students can get targeted instruction at their level. For example, a student who is struggling with pre-requisite math skills like multiplication and fractions will be in a math tutorial group that focuses on those skills but may be in an advanced reading group that allows them to participate in literature circles or read Shakespearean sonnets if they are reading above grade level. At Great Oaks every student gets a Tier II intervention!</p> <p>The priorities for the first months were operational and cultural. Operationally, completing the tasks (hiring, approval as a School Nutrition program, curriculum and assessment purchases, and facilities preparation) that would allow us to open in time with less than five months to prepare. In fact, the school opened on August 28th along with the other public schools in the city of Bridgeport. We were fully staffed, met all facilities preparation goals, and were able to provide a free breakfast, lunch and snack from the first day of school.</p> <p>Once open, our priority became building the student and staff culture necessary to drive instructional excellence. We spent a great deal of time establishing Common Picture (routines and procedures that define how we operate on a daily basis) for things as small as collecting papers and as big as afternoon dismissal. This work led to a culture of clear expectation and a strong start in Year 2.</p>	

PART 2: SCHOOL PERFORMANCE

2. School Goals: State the school’s mission statement. Provide the school’s mission-specific, measurable goals. Analyze school progress toward these goals, providing data as appropriate. Add/Remove rows, as necessary.

Mission Statement:

Great Oaks Charter School Bridgeport is committed to preparing all students for college success. At Great Oaks Bridgeport, our unrelenting focus on academic achievement with individualized care and support develops students’ mindsets, skills and knowledge to prepare them for high school and college success. We deeply value our scholars and recognize the greatness in every individual. Our team gets to know students extremely well. They learn the underlying factors holding students back academically and educate to the individual so students reach their maximum potential. By the end of 8th grade, students will be performing at or above grade level in core content areas. They will take ownership over their academic career and consistently act on their commitment to academic excellence. They will understand how the choices they make today can impact the opportunities they have in the future. They will have developed a strong sense of self and pride in their own identity. They will use their strengths to be active contributors to the Great Oaks Bridgeport community and to the greater good.

Goal Statement:

Evidence of Progress toward Goal:

Academic: In Year 1, Great Oaks Bridgeport will build a rigorous academic program that provides individualized instruction and assessment to ensure students make above average gains in Math, Reading and Language Usage.

In Year 1 Great Oaks Bridgeport collected baseline data using the NWEA MAP test that indicated our scholars were performing like an average third or fourth grader in Math and ELA. Spring MAP data after the implementation of our high dose tutoring model indicates that 74% of students made more than one year’s average growth in at least one of the two subjects.

Culture: In Year 1, GO BPT will build a positive school culture that demonstrates high expectations for students and embraces accountability for results.

Panorama survey results across all three stakeholder groups (parents, staff, students) indicate high levels of agreement (average 93%) with the three net promoter questions:

- 1) Great Oaks is preparing Scholars for success in high school and college
- 2) Great Oaks holds scholars to high standards
- 3) I would recommend Great Oaks to other students/families

Great Oaks retained 100% of permanent staff from Year 1 to Year 2.

Insight survey results showed 100% of teachers agree with statement “Great Oaks is a good place to teach and learn.”

Operations: In Year 1 GO BPT will set the foundation for the growth of the school by designing and implementing systems that ensure our school runs smoothly in alignment with our vision and program design.

Great Oaks had strong operations in year 1. GO-BPT was approved as a school nutrition program and passed its administrative review; met all state reporting requirements and timelines; met all fundraising and budgetary goals; and created

operations handbooks that establish clear policies and procedures across the school.

3. Student Achievement: Provide data summarizing school performance and academic achievement. Using the blank space provided, include data evidencing student growth and progress toward closing achievement gaps, including an analysis of normed benchmark assessment data.

Performance Metric:	*2011-12:	*2012-13:	*2013-14:	2014-15:
Average daily attendance rate: See June 2015 PSIS Report for data	n/a	n/a	n/a	92.9%
Chronic absenteeism rate: See June 2015 PSIS Report for data	n/a	n/a	n/a	21.1%
Number of in-school suspensions:	n/a	n/a	n/a	25
Number of out-of-school suspensions:	n/a	n/a	n/a	125
Number of expulsions:	n/a	n/a	n/a	0
Percent of students with 1+ suspension/expulsion:	n/a	n/a	n/a	24%
Cohort graduation rate (if applicable):	n/a	n/a	n/a	N/A
Holding power rate (if applicable):	n/a	n/a	n/a	N/A
Overall School Performance Index (SPI):	n/a	n/a	n/a	N/A
Overall host District Performance Index (DPI):	n/a	n/a	n/a	N/A

Analysis of Smarter Balance data-Average scaled score by subgroup

Subject	All	Black	Hispanic	Male	Female
ELA	2441	2431	2454	2430	2451
Math	2423	2405	2445	2423	2423

*reporting only for subgroups with 20 or more students

In the Spring 2015 SBAC administration the average scaled score across the 6th grade was 2423 in math and 2441 in ELA. An analysis of our Smarter Balance data indicates that in both ELA and Math, Hispanic students at Great Oaks exceed the performance of the school.

On average, black students scored below the school average in both ELA and Math. In ELA, data indicates that this gap is influenced by the comparatively low scores of Special Education students (average of 2377). 10 of the 17 students with IEPs are black.

It's interesting to note that while there is no gap in performance between males and females in math, males scored below the school average in ELA.

4. Best Practice: In 250 words or less, summarize an emerging best practice at your school in the areas of academics, instruction, or school climate (e.g. extended instructional time, supports for English learners, positive behavior management, college access). Describe the concrete strategy and its impact on student learning and/or the school climate referencing quantitative data. Provide evidence of collaboration with local school districts in this area, as appropriate.

At Great Oaks Charter School every student receives two periods a day of small group tutorial instruction. Using data from the NWEA MAP assessment, administered in September, we made tutorial groups of 1-4 students based on student need. While classroom instruction in ELA and Math was focused on the 6th grade Common Core standards, tutorial instruction used formative data to teach foundational skills along a vertical progression. In ELA, our MAP scores indicated students were reading far below grade level on average. This led us to purchase and implement the Fountas and Pinnell Leveled Literacy Instruction a scripted guided reading program for ELA tutorial. Tutors also used six minute solution to develop and monitor progress on reading fluency. In math, tutors worked with the instructional leadership team to plan lessons and practice opportunities aligned with pre-requisite skills their students had not mastered. They also met with the Math teacher at least once a month to review Common Core specific strategies tutors could use to review content taught in class.

As a result of tutorial, we saw academic growth in our students. 43% of our students met or exceeded their growth goals in ELA and 68% met or exceeded their growth goals in Math. 77% of students made more than one year of growth in at least one subject (Math, Reading or Language Usage).

PART 3: STEWARDSHIP, GOVERNANCE, AND MANAGEMENT

5. **Financial Documents:** (1) As required by C.G.S. § 10-66cc(b)(2), submit FY 2014 certified audit statements, including the statement of activities (showing all revenues from public and private sources, expenditures, and net operating gain/loss), balance sheet, and statement of cash flows. (2) Provide the FY 2015 budget comparing submitted budget versus actual figures, with summary explanations of all major variances. (3) Provide a FY 2016 board-approved budget, summarizing all assumptions and major variances from FY 2015.

6. **Financial Condition:** Provide the following financial data for FY 2015.

Total margin (net income / total revenue):	7.78%
Debt to asset ratio (total liabilities / total assets):	58.82%
Debt service coverage ratio (net income + depreciation + interest expense) / (principal + interest payments):	N/A
Current asset ratio (current assets / current liabilities):	91.99%
Days of unrestricted cash ((total expenditures - depreciation) / 365):	6.07
Cash flow (change in cash balance):	\$30,790

7. **Governing Board:** Consistent with C.G.S. § 10-66bb(d)(3)(A), provide the following information for all governing board members.

Name:	Occupation:	Board Role/Term:	Mailing/Email:	Background Check:
Edwin P. Farrow	Attorney	Chair	3324 Main Street Bridgeport, CT 06606 edwinpfarrow@gmail.com	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Maryellen Butke	Non-profit Professional	Vice-Chair	24 Firglade Ave. Providence, RI 02906 mebutke@gmail.com	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Pamela Fraser-Abder	Professor	Board Member	3 Dogwood Drive Easton, CT 06612 pa1@nyu.edu	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Saaima Khaliq Shahin	Financial Professional	Treasurer	235 East 40th Street, Apt 38B New York, NY 10016	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No

			khaliqshahin2012@gmail.com	
Susan Briggs	Attorney		srbriggs406@gmail.com	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
				<input type="checkbox"/> Yes <input type="checkbox"/> No
				<input type="checkbox"/> Yes <input type="checkbox"/> No
				<input type="checkbox"/> Yes <input type="checkbox"/> No
				<input type="checkbox"/> Yes <input type="checkbox"/> No
				<input type="checkbox"/> Yes <input type="checkbox"/> No

8. **Renewal Terms and Corrective Items:** Provide an update on terms and conditions established in the charter school's most recent renewal; summarize actions taken and progress data to substantiate efforts to address such terms and conditions of renewal. Please note the chart below is pre-populated to include terms and conditions identified in the school's last renewal resolution.

Standard/Indicator:	Term or Condition:	Progress Update:
2.4 Organizational Capacity	Bureau of Educator Standards and Certification sent a letter to the district on June 19, 2015 regarding Techer Certification Compliance Report issues.	One administrator was working outside her certification last year. She is currently enrolled in an 092 program and is expected to be on a DSAP by January 1, 2016.

9. **Best Practice:** In 250 words or less, summarize an emerging best practice at your school in the areas of stewardship, governance, and management (e.g., financial management, technology, school operations). Describe the concrete strategy and its impact on the school referencing quantitative data. Provide evidence of collaboration with local school districts in this area, as appropriate.

The hiring of a dedicated school operations team ensures we are able to meet our substantial local and state reporting obligations while supporting school leaders to focus on instruction. Great Oaks has an Operations team of three (a Director of Operations, Manager of Operations and Office Manager) who collectively manage facilities, technology, state reporting, transportation, school nutrition, student recruitment, student enrollment, human resources, finance and day to day school operations (coverage schedules, space allocations). This allows the remainder of the leadership team to focus on instruction and school culture.

As a result, teachers at Great Oaks receive weekly observations, feedback and coaching in addition to weekly whole-staff professional development. The outcome of this regular professional development is rapid growth in

teacher skill and a culture of constant learning. 100% of staff returned for a second year at Great Oaks and 100% of teachers agree/strongly agree to the survey question, “Great Oaks is a great place to teach and learn.” The operations team also allows for smooth scheduling and operations which facilitates a calm, orderly culture at Great Oaks. This team collaborates with Bridgeport Public Schools on transportation and works closely with the CSDE to ensure adherence to all state policies and reporting requirements.

PART 4: STUDENT POPULATION

10. Enrollment and Demographic Data: Provide 2014-15 student demographic and enrollment information.

Grades Served:	6	Student Enrollment:	127
% Free/Reduced-Price Lunch:	84%	% Black:	56%
% Special Education:	13%	% Hispanic:	39%
% Limited English Proficiency:	12%	% Caucasian:	3%

2014-15 Enrollment by Grade Level:

PK	K	1	2	3	4	5	6	7	8	9	10	11	12	Total
0	0	0	0	0	0	0	127	0	0	0	0	0	0	127

11. Enrollment Efforts: Summarize the school’s efforts to attract, enroll, and retain a diverse and representative student population, including minority students, low-income students, English learners, and students with disabilities.

Overview

Great Oaks Charter School – Bridgeport’s efforts to attract, enroll and retain a diverse and representative student population is visible in Table 10.4. More specifically, the chart below demonstrates that Great Oaks serves a student population that is diverse and representative of the demographics of its host district, Bridgeport Public Schools.

	GO-BPT	BPS*		GO-BPT	BPS*
% Free/Reduced-Price Lunch:	84%	100%	% Black:	56%	38.6%
% Special Education:	13%	12.7%	% Hispanic:	39%	48.8%
% Limited English Proficiency:	12%	13.8%	% Caucasian:	3%	8.8%

**BPS data is from the 2012-2013 Strategic School Profile for Bridgeport Public Schools.*

Demand for the Great Oaks model of high-intensity tutoring and extended learning time was strong. At the time of the lottery for 2014-2015, GO-BPT had received 335 applications for 110 seats. Of those, 59% of applicants were self-reported English Language Learners. Additional applications continued to come in after the lottery.

Admissions Policy and Criteria

As an open-enrollment public school, GO-BPT is open to all students as space permits with a preference given to residents of Bridgeport and English Language Learners. In its first year, the lottery preference for English Language Learners residing in Bridgeport and residents of Bridgeport was executed as outlined below:

1. English Language Learners who reside in Bridgeport: All families that self-identified their child as an English Language Learner on the application were given the ELL preference. In our manual lottery, the first 25% of seats were filled by randomly selecting from only those students who were eligible for the ELL preference and who reside in Bridgeport. Unselected applicants were placed in the general lottery and had an equal chance of selection for the remaining seats. Applications were drawn in random order to fill the remaining seats and to create the order of the waitlist.
2. Students who reside in Bridgeport: The second preference was for students who are residents of Bridgeport. After the first 25% of seats were filled with Bridgeport-resident ELLs, the remainder of seats were selected from the general pool of Bridgeport residents.
3. Non-resident Applicants: As we had already filled our seats, the non-resident applicants were placed on a waiting list based on the order in which their applicant numbers were drawn.

In its recruitment and enrollment efforts GO-BPT does not discriminate against or limit the admission of any student on any unlawful basis, including on the basis of ethnicity, national origin, gender, disability, intellectual ability, measures of achievement or aptitude, athletic ability, race, creed, religion or ancestry.

Recruitment Process and Timetable

Great Oaks staff opened Great Oaks Charter School – Bridgeport on a tight timeline, dramatically limiting the recruitment window for the 2014-2015 school year. After receiving its charter in April, GO-BPT opened its application window almost immediately. Completed online and paper applications arrived quickly and in large numbers. To assign seats beyond the number of available spaces, a random lottery was held on June 16, 2014.

Recruiting and retaining at-risk populations --- specifically students with a history of behavioral and social difficulties, students identified as requiring special education and students who are English Language Learners – requires extra attention and effort to engage those families, as they may not be willing or able to seek out new school options or they may be uncertain of their child’s eligibility for a charter school.

English Language Learners

The Great Oaks – Bridgeport charter provides a preference for English Language Learners who live in Bridgeport. Serving that at-risk population is a priority of the Great Oaks Charter School team. In the 14-15 recruitment cycle, 59% of applicants were self-reported English Language Learners. After administering home language surveys and the LAS Links assessment, GO-BPT staff was able to accurately identify the share of students meeting the guidelines for Limited English Proficiency.

Learning from research and the experiences of the other schools in the Great Oaks networks, Great Oaks Bridgeport utilized the following best practices to recruit, enroll and retain English Language Learners:

Take the time to learn about the cultures and needs of ELL families

Great Oaks – Bridgeport’s school leader, Monica Maccera Filppu, is an immigrant and holds a Master’s degree in TESOL/Bilingual Education. Many other members of the team are from first or second generation families, have experience working in bilingual education and/or have experience working in communities with large populations of immigrants. Operating with humility, the GO-BPT team takes the time to learn about the specific needs of our families and populations and applies that knowledge to targeted efforts to increase awareness of the option of Great Oaks Charter School in those communities.

Connect with community groups that serve immigrant communities

In its efforts to build its founding sixth grade class, Great Oaks conducted outreach to over 120 staff members at churches, agencies and organizations in Bridgeport including many that serve immigrant communities. For example, families self-reported that they heard about GO-BPT through organizations like the International Institute of Connecticut (ICONN), the Greater Bridgeport Latino Network and Bridgeport Caribe Youth Leaders.

Advertise in families’ native language, including providing recruitment materials in English and Spanish

GO-BPT conducted a marketing campaign with wide reach in Bridgeport using bilingual English/Spanish materials. Many marketing strategies intended to reach the student population at large. Examples include direct mail, an electronic billboard, flyers in libraries and community centers, and online search advertising. In addition to those broad tools, GO-BPT also selected neighborhoods with large groups of non-English speakers for increased efforts. GO-BPT specifically targeted high-traffic Hispanic, Vietnamese and Haitian grocery stores, bodegas and restaurants in the following neighborhoods for flyers and posters: Black Rock, the East Side, the West Side, the Hollow and the North End. All recruitment collateral is bilingual English/Spanish.

Utilize ELL families who are already part of our school community to be ambassadors for Great Oaks

GO-BPT worked with community members and organizations, including other charter school parents, to conduct outreach to prospective families. A social media campaign and several old-fashioned neighborhood canvasses helped GO-BPT raise awareness about our brand-new school of choice. Canvasses targeted neighborhoods with high concentrations of at-risk populations, especially lower income families and non-English speaking populations. During the 2015-2016 recruitment cycle, GO-BPT’s families shared information about Great Oaks with their community groups (e.g. churches, neighborhood and family groups).

Host open houses and provide translated materials and presenters who can translate for families

Most GO-BPT open houses were led by bilingual school leaders and conducted in both English and Spanish. When the presenter was not bilingual, either GO-BPT staff or a volunteer provided simultaneous translation.

Have bilingual staff members to help answer families’ questions and fill out paperwork

Most of the GO-BPT main office staff, including the Office Manager, are bilingual English/Spanish speakers that are available whenever the office is open for questions and assistance.

New Strategies for 2015-2016

After this first recruitment cycle, several adjustments will be made.

First, in subsequent years, the order of preference for the Great Oaks lottery will be as follows:

1. Siblings of enrolled students: Great Oaks will give preference in enrollment for siblings of current students. We define siblings as children with at least one shared parent or guardian.
2. English Language Learners who reside in Bridgeport
3. Students who reside in Bridgeport

In addition, beginning with the 2015-2016 recruitment cycle, GO-BPT will engage in even more aggressive efforts to reach Bridgeport’s English Language Learners. In 2015, GO-BPT used Spanish-language radio advertising and targeted families living in immigrant-dense neighborhoods for additional targeted outreach. GO-BPT also adjusted its reporting mechanism on its application for prospective English Language Learners, enabling GO-BPT to have a more accurate list of self-reported ELLs in its lottery. In addition, starting with the 2016-2017 cycle, GO-BPT will find community interpretation services for lower-incident languages for increased outreach in communities with those populations.

12. Waitlist Data: Provide waitlist totals below, illustrating demand and community support for the school.

2011-12 Waitlist:	2012-13 Waitlist:	2013-14 Waitlist:	2014-15 Waitlist:
n/a	n/a	n/a	270

13. Best Practice: In 250 words or less, summarize an emerging best practice at your school in the areas of student populations (e.g., family and community engagement, recruitment processes, retention strategies). Describe the concrete strategy and its impact on the school referencing quantitative data. Provide evidence of collaboration with local school districts in this area, as appropriate.

We are proud of our commitment to serving special populations. In 2014-2015, 13% of students had IEPs, 12% were English Language Learners. An additional 9% of students had special needs document in 504 plans. Great Oaks Charter School retained 100% of students with IEPs or 504s and 93% of ELLs. Our mission statement states a commitment to getting to know each scholar’s underlying factor(s) both academically and social-emotionally. Our special services team works closely with Bridgeport Public Schools and the Culture and Academic teams at Great Oaks to ensure we are able to work together to meet the needs of students with special needs.

For English Language Learners, supports include Teaching Assistants in every classroom who are trained to scaffold instruction for ELLs and daily small group instruction as described above through the tutorial program. The vast majority of our ELLs are from homes where Spanish or Portuguese is spoken. Five out of seven administrative staff members can communicate in these languages.

Students with IEPs and 504s are supported as per their learning and behavior plans. The school philosophy is to work closely with the parents of these students as well as outside agencies to provide the support these students need. In addition to high retention of these students, we are proud of their academic performance. In Math, 76% of Special Education students met or exceeded their growth goals on the NWEA MAP assessment. In ELA 71% of students met or exceeded their growth goals on the NWEA MAP Assessment.

APPENDIX B: STATEMENT OF ASSURANCES

It is imperative that charter schools – as with all other public schools – adopt and uphold the highest ethical and legal standards while delivering excellent academic opportunities for students and their families.

As the authorized representative of Great Oaks Charter School, to the best of my knowledge, I affirm that:

1. All board members and staff have satisfactorily completed background checks, including a state and national criminal records check and a record check of the Department of Children and Families Child Abuse and Neglect Registry.
2. If applicable, all charter school management organization (CMO) staff members have satisfactorily completed background checks, as described in (1).
3. All contractors, if the nature of the contractor's work entails close proximity to students in the judgment of the Governing Board, have satisfactorily completed background checks, as described in (1).
4. Records of any and all background checks are on file at Great Oaks Charter School and available for random audit by the Connecticut State Department of Education (CSDE).
5. Great Oaks Charter School has adopted written anti-nepotism and conflict of interest policies, and that no member or employee of the Governing Board has a personal or financial interest in any asset, real or personal, of the charter school.
6. No board member of Great Oaks Charter School serves on the board of another charter school or CMO.
7. All public funds received by Great Oaks Charter School have been, or are being, expended prudently and in a manner required by law.
8. All Governing Board meetings are open and accessible to the public, and that Great Oaks Charter School has posted, and continues to post, on any Internet website that the Governing Board operates, the schedule, agenda, and minutes of each Governing Board meeting, including any meeting of a subcommittee of the Governing Board.
9. Great Oaks Charter School does not discriminate in any employment practice, education program, or educational activity on the basis of race, color, religious creed, sex, age, national origin, ancestry, marital status, sexual orientation, gender identity or expression, disability, or any other basis prohibited by Connecticut state and/or federal nondiscrimination laws.

By signing this Statement of Assurances on behalf of the Governing Board of Great Oaks Charter School, I acknowledge that I understand the terms contained herein and affirm the validity of each statement to the best of my knowledge. I further understand that Great Oaks Charter School may be subject to random audit by the CSDE to verify these statements.

Signature:



Name of Board Chairperson:

Edwin P. Farrow

Date:

9/16/2015

APPENDIX C: 2016-17 PRELIMINARY ENROLLMENT REQUEST

Directions: On an annual basis, charter schools must submit an enrollment request for the following school year. Consistent with C.G.S. § 10-66bb(c), the State Board of Education considers enrollment requests in the context of each school’s charter and record of student achievement.

C.G.S. § 10-66bb(c)(2) places an enrollment cap on the number of students that a state charter school may enroll. However, charter schools with a demonstrated record of achievement may seek a waiver. If the submitted 2016-17 enrollment request requires an enrollment waiver, please specify that below.

1. Complete the table below providing the school’s enrollment and growth history. Submit an enrollment request and growth projections for the upcoming school year.															
School Year:	Actual Enrollment:														
	PK	K	1	2	3	4	5	6	7	8	9	10	11	12	Total
2012-13															
2013-14															
2014-15								125							
2015-16								116	112						
School Year:	2016-17 Enrollment Request:														
	PK	K	1	2	3	4	5	6	7	8	9	10	11	12	Total
2016-17								125	115	110					
2. Based on the request entered above, is the school seeking a waiver to the enrollment cap described in C.G.S. § 10-66bb(c)(2)?													<input type="checkbox"/> Yes <input type="checkbox"/> No		
3. Provide a rationale for the enrollment request, including a synopsis of all relevant assumptions.															
4. Summarize the school’s plans to successfully expand and accommodate the needs of the students served (e.g., programming, staffing, facilities, and class size).															

APPENDIX D: CHARTER SCHOOL PERFORMANCE FRAMEWORK

The Connecticut State Department of Education’s (CSDE) charter school performance framework promotes clear and transparent expectations for all charter schools. The four performance standards are central to measuring schools’ efficacy and viability, and align to state law and national best practices among charter school authorizers, as accumulated by the National Association of Charter School Authorizers. Within each standard area, the framework identifies a series of indicators used to evaluate charter schools. The framework drives the CSDE’s charter school accountability systems and processes, including initial approval decisions, annual monitoring, and renewal determinations.

Performance Standards:	
1.	School Performance: Is the school a successful model resulting in strong student outcomes and a positive school climate?
2.	Stewardship, Governance, and Management: Is the school financially and organizationally healthy and viable?
3.	Student Population: Is the school promoting equity by effectively attracting, enrolling, and retaining students, particularly among targeted populations?
4.	Legal Compliance: Is the school acting in compliance with applicable laws and regulations?

Performance Standards:	Performance Indicators:
1. School Performance	1.1. Student Achievement, Growth, and Gap Closure 1.2. Mission-Specific Goals 1.3. School Culture and Climate 1.4. Instruction 1.5. Academic Program 1.6. Supports for Special Populations
2. Stewardship, Governance, and Management	2.1. Fiscal Viability 2.2. Financial Management 2.3. Governance and Management 2.4. Organizational Capacity 2.5. Accountability Measures 2.6. School Facility
3. Student Population	3.1. Recruitment and Enrollment Process 3.2. Waitlist and Enrollment Data 3.3. Demographic Representation 3.4. Transfer/Retention Rates 3.5. Parental and Community Support
4. Legal Compliance	4.1. Signed Statement of Assurances 4.2. Open Public Meetings

Great Oaks Charter School – Bridgeport
Budget vs. Actual - Variance Explanations
June 30, 2015

Revenue

Based on the actual enrollment on count day of 125 students, all enrollment related revenue accounts are on budget through May with the exception of Food Service. Food Service Revenue reflects our experience in Year 1 of reimbursements running at the rate of 67% against the overall cost for student meals. On a full year basis, we expect to be \$35k worse than budget if this run rate continues through to year-end. Revenue From Special Education Services represents reimbursements for district provided services. Finally, there is no E-Rate reimbursement for FY15.

Expenses:

Personnel Costs – are \$72k better than budget primarily due to the hiring of several public allies as tutors to work in the school. The cost of these tutors was originally budgeted under the salary category; however, public allies are paid directly by a third party and the associated cost for these tutors is classified in the Contracted Services category below.

Contracted Services – are \$72k worse than budget due to the fact that the budgeted cost for all tutors was classified under salaries; however, the actual fees for public ally tutors were paid as Contracted Services.

School Operations – are \$26k better than budget for the year due primarily to the savings achieved in the special education supplies account.

Facility Costs – are \$8k better than budget for the year.

Tutor Expenses – are \$11k better than budget for the year due to savings in housing and supplies associated with supporting the tutor program.

Summary: On an overall basis, Great Oaks Charter School Bridgeport exceeded its overall budget target on a net basis by \$28k.

Great Oaks Charter School - Bridgeport Inc.

Budget vs. Actuals: Budget - FY15 P&L

July 2014 - June 2015

	Total		
	Actual	Budget	over Budget
Income			
40100 REVENUES FROM STATE SOURCES-Per Pupil Revenue	1,375,000.00	1,375,000.00	0.00
40200 REVENUES FROM STATE SOURCES-Special Education Revenue	27,695.20	0.00	27,695.20
41200 REVENUES FROM FEDERAL SOURCES-Title I	38,464.00	38,464.00	0.00
41300 REVENUES FROM FEDERAL SOURCES-Title Funding - Other	69.00	69.00	0.00
41400 REVENUES FROM FEDERAL SOURCES-School Food Service (Free Lunch)	55,037.39	90,000.00	-34,962.61
41510 REVENUES FROM FEDERAL SOURCES-Federal Grants-Charter School Program (CSP)	345,134.21	350,000.00	-4,865.79
42110 LOCAL & OTHER REVENUE-Contributions and Donations-Foundations	152,500.01	150,000.00	2,500.01
42300 LOCAL & OTHER REVENUE-Erate Reimbursement	0.00	10,800.00	-10,800.00
42800 LOCAL & OTHER REVENUE-Other Local & Misc Revenue	52,520.01	50,000.00	2,520.01
Total Income	\$ 2,046,419.82	\$ 2,064,333.00	-\$ 17,913.18
Gross Profit	\$ 2,046,419.82	\$ 2,064,333.00	-\$ 17,913.18
Expenses			
51100 PERSONNEL SERVICE COSTS-ADMINISTRATIVE STAFF PERSONNE-Executive Management	137,846.20	140,000.00	-2,153.80
51300 PERSONNEL SERVICE COSTS-ADMINISTRATIVE STAFF PERSONNE-Deans, Directors & Coordinators	187,998.85	195,000.00	-7,001.15
51600 PERSONNEL SERVICE COSTS-ADMINISTRATIVE STAFF PERSONNE-Administrative Staff	161,020.62	168,000.00	-6,979.38
53100 PERSONNEL SERVICE COSTS-INSTRUCTIONAL PERSONNEL COSTS-Teachers - Regular	195,021.12	195,000.00	21.12
53200 PERSONNEL SERVICE COSTS-INSTRUCTIONAL PERSONNEL COSTS-Teachers - SPED	24,720.00	0.00	24,720.00
53400 PERSONNEL SERVICE COSTS-INSTRUCTIONAL PERSONNEL COSTS-Tutors	138,954.51	205,000.00	-66,045.49
57100 PERSONNEL SERVICE COSTS-PAYROLL TAXES AND BENEFITS-Payroll Taxes	90,942.33	83,600.00	7,342.33
57200 PERSONNEL SERVICE COSTS-PAYROLL TAXES AND BENEFITS-Fringe / Employee Benefits	85,235.93	91,540.00	-6,304.07
57300 PERSONNEL SERVICE COSTS-PAYROLL TAXES AND BENEFITS-Retirement / Pension	0.00	16,000.00	-16,000.00
Total Personnel Service Costs	1,021,739.56	1,094,140.00	-72,400.44
61000 CONTRACTED SERVICES-Accounting / Audit	15,000.00	15,000.00	0.00
63000 CONTRACTED SERVICES-Support Organization Fees	137,499.97	137,500.00	-0.03
64000 CONTRACTED SERVICES-Nurse Services	3,602.90	0.00	3,602.90
66000 CONTRACTED SERVICES-Payroll Services	3,398.22	2,000.00	1,398.22
67100 CONTRACTED SERVICES-Tech Support	18,100.00	17,000.00	1,100.00
69000 CONTRACTED SERVICES-Other Purchased Professional	65,980.00	0.00	65,980.00
Total Contracted Services	243,581.09	171,500.00	72,081.09
71500 SCHOOL OPERATIONS-Classroom / Teaching Supplies &	41,514.41	40,000.00	1,514.41
72000 SCHOOL OPERATIONS-Special Ed Supplies & Materials	17,246.71	45,000.00	-27,753.29
72500 SCHOOL OPERATIONS-Textbooks / Workbooks	33,795.97	28,048.00	5,747.97
73000 SCHOOL OPERATIONS-Supplies & Materials other	12,301.17	16,250.00	-3,948.83
73500 SCHOOL OPERATIONS-Equipment / Furniture	1,202.78	0.00	1,202.78
73600 SCHOOL OPERATIONS-Copier Maintenance/Lease	4,237.76	6,000.00	-1,762.24
74500 SCHOOL OPERATIONS-Technology	41,220.74	40,000.00	1,220.74
75000 SCHOOL OPERATIONS-Student Testing & Assessment	1,324.26	2,500.00	-1,175.74
75500 SCHOOL OPERATIONS-Field Trips	822.00	3,000.00	-2,178.00
77000 SCHOOL OPERATIONS-Office Expense	19,681.69	12,500.00	7,181.69
77500 SCHOOL OPERATIONS-Staff & Curr Development	9,072.69	12,000.00	-2,927.31
77600 SCHOOL OPERATIONS-Staff Development - Food	5,385.81	5,000.00	385.81
78000 SCHOOL OPERATIONS-Staff Recruitment	9,999.75	10,000.00	-0.25
78500 SCHOOL OPERATIONS-Student Recruitment / Marketing	22,007.44	23,000.00	-992.56
78600 SCHOOL OPERATIONS-Student/Staff Uniforms	7,547.84	5,000.00	2,547.84
78700 SCHOOL OPERATIONS-Student Activities	2,703.74	5,000.00	-2,296.26
79300 SCHOOL OPERATIONS-Other School Operations	3,362.84	6,500.00	-3,137.16
Total School Operations	233,427.60	259,798.00	-26,370.40
80100 FACILITY OPERATION & MAINTENANC-Rent - 510 Barnum	102,945.98	99,890.00	3,055.98
81000 FACILITY OPERATION & MAINTENANC-Insurance	22,743.93	20,000.00	2,743.93
82000 FACILITY OPERATION & MAINTENANC-Janitorial	36,274.06	45,000.00	-8,725.94
83900 FACILITY OPERATION & MAINTENANC-Other Building Related	16,357.42	5,000.00	11,357.42
84000 FACILITY OPERATION & MAINTENANC-Repairs & Maintenance	13,249.10	18,000.00	-4,750.90
86100 FACILITY OPERATION & MAINTENANC-Telephone	3,187.69	8,000.00	-4,812.31
86150 FACILITY OPERATION & MAINTENANC-Internet	1,397.17	6,000.00	-4,602.83
86200 FACILITY OPERATION & MAINTENANC-Depreciation	36,053.51	35,562.00	491.51
86250 FACILITY OPERATION & MAINTENANC-Food Service	86,927.47	90,000.00	-3,072.53
Total Facility Operations	319,136.33	327,452.00	-8,315.67
91500 Tutor Expenses-Rent - Tutor House	46,832.65	52,500.00	-5,667.35
91600 Tutor Expenses-Food for Tutor House	23.40	0.00	23.40
91700 Tutor Expenses-Tutor Commuting/Metrocards	1,458.50	9,000.00	-7,541.50
97000 Tutor Expenses-Utilities - Tutor House	10,933.45	5,500.00	5,433.45
97230 Tutor Expenses-Maintenance Expense/Supplies for Tutor House	8,722.52	9,575.00	-852.48
97240 Tutor Expenses-Cable/Internet - Tutor House	1,384.63	4,125.00	-2,740.37
Total Tutor Expenses	69,355.15	80,700.00	-11,344.85
Total Expenses	\$ 1,887,239.73	\$ 1,933,590.00	-\$ 46,350.27
Net Operating Income	\$ 159,180.09	\$ 130,743.00	\$ 28,437.09
Net Income	\$ 159,180.09	\$ 130,743.00	\$ 28,437.09

Great Oaks Charter School - Bridgeport Inc.

Budget - Fiscal Year 2016

July 2015 - June 2016

	<u>Budget</u>
Income	
40100 REVENUES FROM STATE SOURCES-Per Pupil Revenue	2,475,000
40200 REVENUES FROM STATE SOURCES-Special Education Revenue	74,772
41200 REVENUES FROM FEDERAL SOURCES-Title I	73,125
41300 REVENUES FROM FEDERAL SOURCES-Title Funding - Other	5,625
41400 REVENUES FROM FEDERAL SOURCES-School Food Service (Free Lunch)	113,400
41500 REVENUES FROM FEDERAL SOURCES-Federal Grants	604,350
41510 REVENUES FROM FEDERAL SOURCES-Federal Grants-Charter School Program (CSP)	400,000
42110 LOCAL & OTHER REVENUE-Contributions and Donations-Foundations	250,000
Total Income	<u>3,996,272</u>
Gross Profit	3,996,272
Expenses	
51100 PERSONNEL SERVICE COSTS-ADMINISTRATIVE STAFF PERSONNE-Executive Management	140,000
51300 PERSONNEL SERVICE COSTS-ADMINISTRATIVE STAFF PERSONNE-Deans, Directors & Coordinators	275,800
51600 PERSONNEL SERVICE COSTS-ADMINISTRATIVE STAFF PERSONNE-Administrative Staff	219,050
53100 PERSONNEL SERVICE COSTS-INSTRUCTIONAL PERSONNEL COSTS-Teachers - Regular	398,000
53200 PERSONNEL SERVICE COSTS-INSTRUCTIONAL PERSONNEL COSTS-Teachers - SPED	107,000
53400 PERSONNEL SERVICE COSTS-INSTRUCTIONAL PERSONNEL COSTS-Tutors	647,683
57100 PERSONNEL SERVICE COSTS-PAYROLL TAXES AND BENEFITS-Payroll Taxes	207,354
57200 PERSONNEL SERVICE COSTS-PAYROLL TAXES AND BENEFITS-Fringe / Employee Benefits	162,013
57300 PERSONNEL SERVICE COSTS-PAYROLL TAXES AND BENEFITS-Retirement / Pension	10,329
Total Personnel Service Costs	<u>2,167,229</u>
61000 CONTRACTED SERVICES-Accounting / Audit	15,300
63000 CONTRACTED SERVICES-Support Organization Fees	247,500
66000 CONTRACTED SERVICES-Payroll Services	11,600
67100 CONTRACTED SERVICES-Tech Support	28,000
69000 CONTRACTED SERVICES-Other Purchased Professional	72,500
Total Contracted Services	<u>374,900</u>
71000 SCHOOL OPERATIONS-Board Expenses	5,000
71500 SCHOOL OPERATIONS-Classroom / Teaching Supplies &	58,750
72000 SCHOOL OPERATIONS-Special Ed Supplies & Materials	10,000
72500 SCHOOL OPERATIONS-Textbooks / Workbooks	20,000
73000 SCHOOL OPERATIONS-Supplies & Materials other	10,000
73600 SCHOOL OPERATIONS-Copier Maintenance/Lease	12,500
74500 SCHOOL OPERATIONS-Technology	18,750
75000 SCHOOL OPERATIONS-Student Testing & Assessment	5,000
75500 SCHOOL OPERATIONS-Field Trips	15,000
77000 SCHOOL OPERATIONS-Office Expense	20,000
77500 SCHOOL OPERATIONS-Staff & Curr Development	35,000
77600 SCHOOL OPERATIONS-Staff Development - Food	7,500
78500 SCHOOL OPERATIONS-Student Recruitment / Marketing	20,000
78600 SCHOOL OPERATIONS-Student/Staff Uniforms	10,000
78700 SCHOOL OPERATIONS-Student Activities	10,000
79300 SCHOOL OPERATIONS-Other School Operations	7,500
Total School Operations	<u>265,000</u>
80100 FACILITY OPERATION & MAINTENANC-Rent - 510 Barnum	294,640
81000 FACILITY OPERATION & MAINTENANC-Insurance	45,000
82000 FACILITY OPERATION & MAINTENANC-Janitorial	80,000
83900 FACILITY OPERATION & MAINTENANC-Other Building Related	26,250
84000 FACILITY OPERATION & MAINTENANC-Repairs & Maintenance	37,729
86100 FACILITY OPERATION & MAINTENANC-Telephone	10,000
86150 FACILITY OPERATION & MAINTENANC-Internet	7,500
86200 FACILITY OPERATION & MAINTENANC-Depreciation	78,557
86250 FACILITY OPERATION & MAINTENANC-Food Service	151,200
Total Facility Operations	<u>730,876</u>
91500 Tutor Expenses-Rent - Tutor House	170,100
97000 Tutor Expenses-Utilities - Tutor House	29,700
97230 Tutor Expenses-Maintenance Expense/Supplies for Tutor House	5,400
Total Tutor Expenses	<u>205,200</u>
Total Expenses	<u>3,743,205</u>
Net Operating Income	<u>253,067</u>
Net Surplus	253,067