



Bridge Preparatory Charter School

Board Meeting

Published on November 21, 2024 at 10:48 AM EST

Date and Time

Thursday November 21, 2024 at 7:00 PM EST

Location

Bridge Preparatory Charter School
715 Ocean Terrace
Building A - Atrium (Main Floor)
Staten Island, NY 10301

557 5th st
Brooklyn, NY 11215

60 Washington Square S
NY, NY 10003

Agenda

	Purpose	Presenter	Time
I. Opening Items			7:00 PM
A. Record Attendance		Geena Kuriakose	1 m
B. Call the Meeting to Order		Geena Kuriakose	2 m

	Purpose	Presenter	Time
C. Approve Minutes from October 17 Meeting	Approve Minutes	Geena Kuriakose	2 m
II. Votes			7:05 PM
A. Vote on Search Firm	Vote	Tim Castanza	5 m
Approval of search firm (StorbeckSearch) to assist in identifying and hiring instructional leader.			
III. Monthly Deep Dive			7:10 PM
A. Enrollment Data Deep Dive	Discuss	Tim Castanza	25 m
B. Special Education Deep Dive	FYI	Tim Castanza	5 m
IV. Other Business			7:40 PM
A. School Leadership Updates	FYI	Tim Castanza	10 m
B. Update from the Family Association	FYI	Amanda Wolkowitz	5 m
C. Public Comment	FYI	Geena Kuriakose	2 m
V. Closing Items			7:57 PM
A. Review of Action Items & Next Steps	FYI	Traci Frey & Mark Harmon-Vaught	2 m
B. Adjourn Meeting	Vote		

Coversheet

Approve Minutes from October 17 Meeting

Section:	I. Opening Items
Item:	C. Approve Minutes from October 17 Meeting
Purpose:	Approve Minutes
Submitted by:	
Related Material:	Minutes for Board Meeting on October 17, 2024



Bridge Preparatory Charter School

Minutes

Board Meeting

Date and Time

Thursday October 17, 2024 at 7:00 PM

Location

Bridge Preparatory Charter School
715 Ocean Terrace
Building A - Atrium (Main Floor)
Staten Island, NY 10301

3298 Victory Blvd
Staten Island, NY 10314

Trustees Present

A. Wolkowitz, D. Medina, G. Kuriakose, M. Harmon-Vaught, T. Frey

Trustees Absent

N. DeStefano, R. Peters

Ex Officio Members Present

T. Castanza (remote)

Non Voting Members Present

T. Castanza (remote)

Guests Present

C. Otterbeck, F. Ebanks (remote), K. Baldassano (remote), R. Illuzzi, T. Gore (remote)

I. Opening Items

A. Record Attendance

B. Call the Meeting to Order

G. Kuriakose called a meeting of the board of trustees of Bridge Preparatory Charter School to order on Thursday Oct 17, 2024 at 7:00 PM.

C. Approve Minutes from September 12th Meeting

G. Kuriakose made a motion to approve the minutes from Board Meeting on 09-12-24.

G. Kuriakose stated if there is no objection, the motion to approve the minutes of the 09-12-24 board meeting will be adopted. As there was no objection, the motion is adopted and the minutes are approved by unanimous consent.

The board **VOTED** unanimously to approve the motion.

D. Welcome & Update From Co-Chairs

M. Harmon-Vaught stated that before we get started on the agenda, we are absolutely excited to officially welcome one returning board member (A. Wolkowitz) and one new board member (D. Medina). Welcome back, Amanda! Welcome to the Board, Deidre. You have both been officially approved as trustees. We're excited to have you. As K. Baldassano noted earlier, with you both joining as trustees our quorum is now 5 board members. We're still waiting to hear about our other board candidate's approval.

II. Votes

A. Approve Draft Audit

M. Harmon-Vaught made a motion to approve the draft of Bridge Preparatory Charter School's fiscal year 2024 financial audit as presented to the Board of Trustees upon the recommendation of the Finance Committee.

G. Kuriakose seconded the motion.

(A copy of the draft audit was shared with the trustees and is attached to tonight's meeting agenda for review by the Board of Trustees)

- M. Harmon-Vaught stated that R. Peters, Chair of the *Finance Committee* was unable to attend the committee meeting due to a death in her family, so he attended in her stead, working with T. Castanza. There was a presentation and report from the new auditors MMB & Co. (*Mengel, Metzger, Barr & Co.*) that we worked with this year for the 1st time. T. Castanza had a very positive experience with the auditors, who were very thorough and thoughtful in the work that they did. They put together a very impressive presentation which was very clear and detailed and they answered a lot

of questions. It was, as it has been in prior years, an unqualified clean audit, which is an enormous testament to the good work of the school. It's a reflection of the the sound financial practices and intentional decision-making at the school level around its budget and monies.

- T. Castanza added that the audit process was a little more intense this year because we worked with a new audit team that did a really deep dive and our school team needed to be really responsive to daily needs and polls. Everything about the audit was digital and done virtually. There was no school visit as there had been in the past. They also were able to give us some guidance on best practices in different financial areas. He found them to be not just a good partner for the audit, but a good partner for the school, so it was the right decision by the Board to bring in the new auditors.
- M. Harmon-Vaught stated that this vote is to adopt the draft audit, pending finalization, as it has been our standard practice to adopt the audit before its finalization.

The board **VOTED** unanimously to approve the motion.

III. Academic Data Deep Dive

A. Academic Data Deep Dive

T. Frey said that she and M. Harmon-Vaught proposed a calendar for the board's work for this year and a different committee will be responsible for leading the meeting agenda each month. This month the *Academic Committee* is leading the work that we're doing to engage in an Academic Data deep-dive. T. Castanza and C. Otterbeck support this effort and will do most of the presenting tonight. The academic data was shared with the board members prior to tonight's meeting but there are some changes that T. Castanza will cover tonight. As they go through and present the data, keep in mind it's the beginning-of-year data. So it's not as rich as the data we'll have in February or in May, when we have a full year's worth of data. If you see something that you don't understand or a term you don't know, please ask, because we want to make sure that everyone around the table has a good understanding of what they're looking at. This is about the school and is not an indication of how we feel personally towards school leadership. We're all in this together to make the school work well, and in the end to support our students. She then gave the floor to C. Otterbeck and T. Castanza.

T. Castanza gave some overall context on the work that's being done. The beginning-of-year data is baseline data. Before we start, one of the things that we considered is what is the impact on the data of the large number of new students that we have? This is the the largest new cohort that we've taken in our history. Over 90 new students. And they come to us with varying ability levels. So as we go through the year and look at data. maybe we'll add some metrics. What does data look like for students that have been with us for 2 years? This is a data point that's been helpful to us during the renewal process. The month of September felt very assessment-heavy and the teachers did a really nice job administering the assessments. We saw a lot of improvement in practice of administering assessments,

which is important to get the accurate real and true data. That was an issue that we had last year wondering how accurate or how close the data was. We've noticed some real improvements in practice. He then gave the floor to C. Otterbeck to review the Academic data using an on-screen Excel worksheet presentation.

C. Otterbeck presented the following Academic data:

- Student Behavioral Incidents (General Ed. 36.9%; Special Ed. 63%)
- Average Daily Attendance (94%)
- Percentage of New Students in Each Grade
- Beginning-of-Year Proficiency Percentages for Math & ELA with Charts of MAP Data
- Beginning-of-Year Proficiency Percentages Disaggregated by Grade Levels
- Beginning-of-Year Acadience Benchmark Composite Scores Schoolwide & For Each Grade Level

Board members asked for specifics and clarification of some data as it was presented and a question and answer session punctuated each topic with T. Castanza adding more information in each section of the presentation and answering any questions raised by the board.

T. Frey thanked C. Otterbeck and T. Castanza for the Academic Data information and said that the board appreciates the amount of work that went into preparing this presentation and the time they spent to go through this data tonight. She also said that the trustees appreciate the fact that C. Otterbeck and T. Castanza were open about the data but also offered information on what the school is doing to improve the scores and percentages.

IV. Other Business

A. School Leadership Updates

T. Castanza said that there's a lot happening in October at the school and gave the following update:

- Schoolwide teams have been working on U.N. DAY, which will be held on October 21st.
- We celebrated DYSLEXIA AWARENESS DAY schoolwide on October 8th, and had great participation from staff and students.
- Students did a really nice job celebrating HISPANIC HERITAGE MONTH. Our social media highlighted the wax museum that they held for famous Hispanic men and women from throughout history.
- On October 28th, we're hosting our 1st campus-wide event a CAMPUS COLOR RUN with our colleagues from the other campus schools, Hungerford School and Petrides School.
- We uploaded our DISTRICT SAFETY PLAN to NYCED per regulations; we updated our safety plan ahead of time since the board approved it early. We are doing really

well with our safety and security drills. We must hold a certain number of drills by October 31st and we have a drill scheduled for next week that will put us in compliance before Halloween.

- BEDS DAY (*Basic Educational Data System*) for charter schools is early October this year when charter schools need to submit annual enrollment data; we reported 260 students enrolled.
- We are working on the next big level of data reporting, the remainder of the ANNUAL REPORT, which is due November 1st.
- Right now he is at the READING LEAGUE CONFERENCE in Charlotte, with our coaches and our Director of Operations, F. Ebanks.
- Next week he will be going with some of our teachers to the INTERNATIONAL DYSLEXIA ASSOCIATION CONFERENCE; excited to watch our staff dive into really good content that they're going to turnkey for other staff on November 5th.
- Our EXTERNAL AFFAIRS TEAM, a new team that we started this year, met to discuss the types of information that leave the school building, whether it goes to families or the community. We are focusing on our website, refreshing and updating of our website within the next couple of weeks. Our social media is increasing its game.
- We have a NEW MESSAGING & INFORMATION APP. that we're going to be rolling out to families on October 25th. It will also help us within the school with staff members having the ability to email and message each other on the app. And we put a lot of school information on there, so it'll help us reduce the amount of paper that we are using in the building and notices that we're printing.
- At last week's *Executive Committee* meeting he gave a SEARCH FIRM UPDATE; we are looking to bring on an external search firm to help us find our new instructional leader. He spoke to *Storbeck Search* and they offered a proposal. One of the things discussed with the Executive Committee was that our *Financial Policies & Procedures Manual* has a provision about obtaining at least 2 competitive bids for proposals over \$20,000. He's reached out to *Carney, Sandoe & Associates*, another well-regarded firm in the school leadership search industry; he's waiting for them to get back to him with their proposal, so that he can discuss the 2 options with the Executive Committee before presenting recommendations to the full board in November.

B. Update from the Family Association

D. Medina gave the following *Family Association* update:

It's been a very slow start, but everything's merging and meshing well.

- We're holding our 1st school event this weekend - our TRUNK-OR-TREAT in the school's parking lot on Sunday October 20th (10:30 am to 1:00 pm). We're trying to offer some new options. We have a fun DJ and a lot of interactive things for the kids, like face painting.

- On October 31st we're holding our PUMPKIN PATCH event and every student will get a pumpkin and we take pictures. Every class gets a turn coming to the pumpkin patch.

C. Public Comment

V. Closing Items

A. Review of Action Items & Next Steps

M. Harmon-Vaught wanted to mention the things that we have on our Board Business Calendar for the next meeting - just as a point of discussion.

Tonight's meeting was all about the Academic Data Dashboard and next month in November we have a few items, particularly a deep-dive on Student Enrollment and Student Support.

B. Adjourn Meeting

There being no further business to be transacted, and upon motion duly made, seconded and approved, the meeting was adjourned at 8:06 PM.

Respectfully Submitted,
K. Baldassano

Coversheet

Vote on Search Firm

Section:	II. Votes
Item:	A. Vote on Search Firm
Purpose:	Vote
Submitted by:	
Related Material:	Bridge Prep Principal STO proposal.pdf



Bridge Preparatory Charter School Principal

PRESENTED IN SEPTEMBER 2024 BY:

Katie Vivalo Rouse, Managing Director

Ruth Shoemaker Wood, Managing Director



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Bridge Preparatory Charter School: Principal

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Dear Tim,

It was wonderful to meet you over zoom. Thank you for investing the time to share more about Bridge Prep, the founding mission and purpose, and the current charge for an instructional leader. It is with great pleasure that we present our proposal to assist you in the search to find Bridge Preparatory Charter School's next Principal. With a strong background in executive search and school leadership, we understand the cultural trends, opportunities, and challenges that face our Pre-K-12 schools as they continue post-pandemic recovery. There are many things that differentiate us from our peer firms; however, there are five we'd like to outline here. Each of these is also described in further detail in our proposal:

1. Our experience and record differentiate us from many of our peers and competitors for the breadth and depth of candidates and networks we tap to find the right leader for each school we serve.
2. Our commitment to diversity and inclusion – founding principles of our firm – ensures that the pool is as diverse as it is deep, and that it matches your expectations and current and future priorities you identify for your next Principal.
3. Our recruitment approach is also a key differentiator, as we cultivate sources and prospects over several conversations to anchor their interest solidly in the Principal position. Our search team leaders are also well known in the national Pre-K-12 school community and deeply trusted by leaders for their work in supporting, mentoring, and sponsoring exceptional talent.
4. Our process is thorough. We work in partnership with you and search committee; conduct listening sessions to learn your language, traditions, and values; train your committee in implicit bias and how to facilitate a structured interview; and then support the finalist round with background and social media checks, and primary and secondary referencing to avoid any surprises in the end.
5. Finally, we have a long history – and depth of experience – in advising boards and committees on leadership transitions and providing coaching and counsel to you and your placement on a successful onboarding process.

A successful leadership search stems from a trusting relationship, one we believe in forming from our first conversation with you. We are grateful for this opportunity, and humbly submit our interest in creating that partnership with you and Bridge Prep.

Katie Vivalo Rouse, Managing Director

Ruth Shoemaker Wood, Managing Director



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Firm Overview

Cultivating New Leadership for a Changing World

Our deep relationships with our clients remind us daily of the value of exceptional leadership in institutions that are vitally important to our communities, our society, and the future. We believe in the transformative power of education and the nonprofit sectors.

What Will We Bring to Your Search?

Our clients return to us again and again because their success is our priority. They know we will deliver:

- **Integrity** in representing the needs of our clients in a vigorous and diligent manner, while treating all candidates with dignity, fairness, and honesty;
- The **national reputation and connections** that open doors to candidates of outstanding ability and potential from all backgrounds;
- A search process that centers **equity, inclusion, and sustainability** on behalf of our clients and our candidates in recognition of important cultural, political, and historical contexts; and
- The **insight** and **logistical dexterity** that come from decades of search experience and hundreds of completed searches for colleges, universities, and Pre-K-12 schools, including independent, charter, public, and religious.

Commitment to Equity and Inclusion

Our colleges, universities, schools, and nonprofit organizations are poised to solve some of our country's most challenging problems; we share our clients' belief that finding new leaders from groups that have historically been excluded is crucial to advancing society's educational needs and solving these problems from multiple perspectives and vantage points. At every stage of the search, we offer counsel on inclusive and equitable best practices, including building a representative search committee (if the search will use a committee), drafting comprehensive language in the position description and qualifications, proactively building a diverse (by all definitions) candidate pool, and guiding the committee through vetting (interviews and referencing) that focuses on demonstrated qualifications measured against clear criteria.

We work at every turn to foster environments of belonging and accountability and recognize the necessity of investing in this work within our own organization. Our entire staff undergoes training to hone our ability to recognize implicit bias and the cognitive shortcuts to which decision-makers might be prone. Our [Vice President for Equity and Inclusive Excellence, Ralph Tavares, Jr.](#), provides expertise and guidance on best practices in this space and is a dedicated resource to internal teams and clients alike. We are proud to note our distinctive history as a woman-owned and woman-led firm, and we stand ready to help anticipate and identify issues related to equity and inclusiveness in the search process. While all key decisions are the responsibility of the search committee and the institution, we see our role as setting the procedures and tone for a fair, rigorous, and inclusive process.

Questions we frequently ask hiring teams and search committees include:

- What assumptions are we making about the candidate that may not be based on evidence?
- Are we focusing too much on pedigree of degrees or employers versus specific accomplishments or performance of the candidates?
- Have we created criteria that focus on experiences and characteristics that match the challenges and opportunities facing the institution?
- Are we able to distinguish between making decisions on experience versus potential?
- Are we creating a committee culture that allows each committee member to share safely their individual perspectives and insights?
- Are we signaling to all candidates (through position description, questions asked, sensitivity to personal considerations, etc.) the institution's commitments and values around equity and inclusion?

In every search we lead, we commit to working proactively and energetically to recruit an excellent and diverse pool of candidates. We are proud of our record of developing exceptional and diverse candidate pools and, as a result, bringing diversity to leadership. In **2023**, our Education Practice consultants completed more than **200** searches. Among our placements, **53 percent** identified as **female**, **transgender**, or **non-binary**, and **45 percent** identified as **persons of color**. To ensure we are reflecting the lived experience of our candidates, they may receive an optional demographic data survey allowing them to self-identify in the areas of gender, race and ethnicity, sexual orientation, and U.S. Veteran status. The data is reviewed internally for the aggregate analysis of candidate pools to help ensure firm practices are inclusive and representative.

While respecting our past and current clients' confidentiality, we would be happy to share with you, in person, examples of the role we can play in helping the hiring team navigate these important and timely issues.

Our Story

Founded in 2007, Storbeck Search's focus was serving education and education-related clients. The 2020 acquisition by **Diversified Search Group (DSG)** brought together consultants from **Storbeck Search**, **Diversified Search**, and **Koya Partners** to form the **Education Practice** of Diversified Search Group, a single firm comprising a portfolio of search firms focused on specialized market sectors. DSG's family of firms also includes Alta Associates, BioQuest, Grant Cooper, and Yardstick Management, with niches in cybersecurity, life sciences, academic medicine, and consulting, respectively. In combining, we have deepened our networks and expanded our global reach, while maintaining our commitment to diversity and inclusion and our reputation for personalized service.

The Education Practice excels in executive search on behalf of colleges and universities nationwide. Our "91" Net Promoter Score – measuring the quality of our search methodology and client satisfaction – is considered exceptional in the industry. (For comparison, the global benchmark of companies across all industries that measure NPS is 32.) Storbeck Search brings depth and breadth of experience to executive search in higher education because of our people. Our consultants and researchers – most of whom have had extensive experience in higher education prior to their work in executive search – work together to develop high-quality candidate pools for every search. Our team brings knowledge and understanding to our clients' searches for the highest levels of institutional leadership from the broadest base of candidates possible.

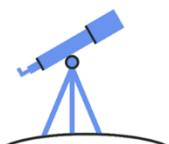
Diversified Search Group has been ranked among the top ten search firms in the world by *Forbes*. Additionally, DSG is the official U.S. partner of AltoPartners, the international alliance of executive search firms that spans 58 offices in 34 countries across the Americas, Europe, the Middle East, Africa, and Asia Pacific.



More than two-thirds of our searches are conducted for **returning clients**

53% of placed leaders identify as **female, transgender, or non-binary**

Nearly half of placed leaders identify as **persons of color** **45%**



Since Storbeck's founding, we have completed **1,000+ searches in the Education and Nonprofit sectors**



We have worked closely with **charter schools nationwide**

Why We Stand Out

Why We Stand Out in Pre-K-12 School Search

- ◆ **Expertise** – Led by consultants who have direct experience working in Pre-K-12 schools, our team approach assures breadth and depth of expertise. In addition to your dedicated search team, the full expertise of the firm’s staff of consultants is ready to be tapped for your search.
- ◆ **Customization** –We take the time to understand your school well and to develop strategies that will produce the best candidate pool and search outcomes for your school.
- ◆ **Research** – We have a dedicated research staff that continually tracks trends and data and updates our in-house database to ensure a relevant and talented pool of educational leaders.
- ◆ **Integrity and Confidentiality** – Integrity is central to everything we do. This includes being willing to turn down another search if it presents the possibility of significant pool overlap with a search we are already conducting. We have robust policies and processes in place to ensure confidentiality to the extent desired by the institution and by potential candidates alike – an important factor for all involved.
- ◆ **Proactive Recruitment** – Some of the most qualified and desirable candidates are not actively seeking new positions. Advertising is a limited tool; instead, we actively research and recruit candidates who we believe will advance your mission. We have the capacity to reach across all sectors, including higher education, Pre-K-12 schools, and nonprofit organizations, to find strong traditional and non-traditional candidates for your search. Furthermore, our record of BIPOC placements surpasses the industry average in Pre-K-12 school search.
- ◆ **Logistical Skill** – Because we are first and foremost experts in search, we run an exceptionally smooth process, handling potential hurdles with a deftness and aplomb that earn the notice of clients and candidates alike.
- ◆ **Breadth of Perspective** – Storbeck Search enjoys an outstanding reputation as a search firm focused in the education sector. We truly understand this sector and the students it serves – from three-year-olds to college seniors, from continuing ed students to doctoral fellows.

Our Leadership Search Experience

Relevant Searches

Our DSG teams have led searches on behalf of the following **charter schools and relevant nonprofit organizations**:

- ◆ **Acero Schools**, Chief Financial Officer
- ◆ **Alain Locke Charter School**, Principal
- ◆ **Aurum Preparatory Academy Charter School**, Executive Director
- ◆ **Boys' Latin of Philadelphia Charter School**
 - Chief Executive Officer
 - Principal
- ◆ **Breakthrough Charter Schools**, Operations Leader
- ◆ **Bridge Boston Charter School**, Executive Director
- ◆ **Brooke Charter Schools Network**, Chief Development Officer
- ◆ **Camino Nuevo Charter Academy**
 - Chief Executive Officer
 - Director of Development
- ◆ **Capital City Public Charter School**, Head of School
- ◆ **Chicago International Charter School**, Chief Executive Officer
- ◆ **Citizens of the World Charter School**, Founding Executive Director, Washington, DC
- ◆ **Classical Charter Schools**
 - Dean of Students
 - Instructional Coach
- ◆ **Core Knowledge Foundation**, President (*active search*)
- ◆ **DC Prep Public Charter School**
 - Dean of Academic Support
 - Dean of Student Support
 - Director of Talent Recruitment
 - Deputy Chief Academic Officer
 - Elementary Assistant Principal
 - Instructional Coach
 - Principal, Benning Elementary Campus

- ◆ **Foundation Academies Charter School**
 - Chief Executive Officer
 - Director of Development
- ◆ **Friendship Public Charter Schools**, Chief Financial Officer
- ◆ **Galapagos Rockford Charter School**, Dean of Instruction
- ◆ **Illinois Network of Charter Schools**
 - Director of Community Impact
 - Director of Government Affairs (*active search*)
- ◆ **Independence Charter School**, Chief Executive Officer (*active search*)
- ◆ **Leaders in Our Neighborhood Charter School**, Executive Director
- ◆ **LEARN Charter School Network**, Director of IT
- ◆ **Mastery Charter Schools**, Director of Development
- ◆ **New Orleans College Prep Charter School**, Chief Academic Officer
- ◆ **Noble Network of Charter Schools**
 - Chief Development Officer
 - Director of Communications
- ◆ **People's Preparatory Charter School**
 - Chief Operating Officer
 - Director of Finance and Operations
- ◆ **Prospect Hill Academy Charter School**
 - Head of School/Chief Executive Officer
 - Human Capital Director
- ◆ **River Valley Charter School**, Director
- ◆ **Rocketship Education**
 - Executive Director - Tennessee Region (*active search*)
 - Executive Director – DC Region (*active search*)
 - Regional Director, DC
 - Executive Director
 - Bay Area Regional Director
 - DC-Region Executive Director
 - Chief Growth Officer
- ◆ **Success Academy Charter Schools**
 - Chief Instructional Officer
 - Chief Philanthropy Officer
 - Dean of Students
 - Leadership Residents
 - Principal
 - Senior Management of Leadership Recruitment

Bridge Preparatory Charter School: Principal

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- ◆ Tech Freire Charter High School, Head of School
- ◆ Two Rivers Charter School, Executive Director
- ◆ Vertex Partnership Academies, Head of School
- ◆ Westlake Academy, Head of School

The Team for Your Search

Searches that succeed are well run. They bring to the fore the finest candidates and deliver a leader who will rise to the new challenge. If we are chosen to partner on this search, we will designate a team of experts who bring extensive experience as well as the ability to support your search with efficiency, timely information, impeccable attention to detail, and discretion.

Katie Vivalo Rouse, Managing Director, and **Ruth Shoemaker Wood, Managing Director**, will lead the team and take responsibility for all aspects of the search. The complete search team, which will be developed based upon expertise and capacity, includes:

- An **Associate** to assist with candidate identification and recruitment;
- A **Search Coordinator** to provide logistical support throughout the process; and
- A **Research Associate** to provide research support at various stages of the search.

Storbeck Search is distinguished by the collegial working relationships that our consultants and associates enjoy across the firm. In regular, confidential check-in meetings, we pool our knowledge and networks to support each other's searches, including sharing ideas for candidates. If you choose this team to work with you on this search, you are tapping into the expertise and connections of every member of our staff.



Katie Vivalo Rouse, **Managing Director**

With over 20 years of experience across education, nonprofits, and Fortune 500 consulting, Katie Vivalo Rouse is a trusted advisor to boards, executive teams and organizations as they grapple with charting their future impact. Within education, Katie has advised over 50 charter and K-12 systems at the state, district, and individual school levels; and dozens of education-related nonprofits. She's [co-authored a publication on addressing teacher shortages and navigating school based staffing in the post-pandemic environment](#); and has advised on city based teacher talent strategies in Washington, DC and Kansas City, MO.

An empathetic and thoughtful leader who invests deeply in setting teams up for success, Katie is passionate about supporting organizations to build and create diverse, equitable, and inclusive teams. She has extensive experience in supporting boards and committees through values- and impact-aligned

decision making. Pragmatic and deeply empathetic – hearing what is said and unsaid, Katie’s clients elevate and value her ability to facilitate discussions that surface disagreement and lead to decisions.

Katie joined Diversified Search Group from Bellwether, a national nonprofit that transforms education to ensure systemically marginalized young people have access to an equitable and excellent education, and live lives filled with opportunity, where she served as a Partner in the Strategic Advising practice area and supported many of Bellwether’s talent initiatives. Prior to that, she held leadership positions in various roles such as Chief Operating Officer and Chief Growth Officer at DC Prep. She completed The Broad Residency at Chicago Public Schools and worked as a consultant and case team leader at Bain & Company. She started her career working in nonprofit capacity building in Washington, D.C., and New York.

Katie lives in DC Metro with her family. She enjoys jogging with her dog and is an avid high school field hockey fan and an advocate for LGBTQIA+ students and their families.

Katie earned an MBA from Harvard Business School and a BA in Education & Sociology/Anthropology from Swarthmore College, and she also holds an Executive Certificate in nonprofit management from Georgetown University.



Ruth Shoemaker Wood, Managing Director

Ruth brings scholarly training and hands-on experience to her understanding of the higher education landscape. Prior to entering the executive search sector, she served as Assistant Dean of Students at New York University’s College of Arts and Science. Before her role in the Dean’s Office at NYU, Ruth worked as a consultant to educational institutions experiencing organizational change and strategic planning challenges.

Ruth also served as a Career Counselor at the University of Pennsylvania where she worked with undergraduates and developed a deep commitment to student advising.

Ruth’s scholarly research centers around the college presidency and cultural change at small liberal arts institutions. Her first book, *Transforming Campus Culture: Frank Aydelotte’s Honors Experiment at Swarthmore College*, was published in 2012 by the University of Delaware Press.

Ruth has enjoyed teaching in the Higher Education graduate programs at NYU, Penn, CUNY, and Rider University where she has developed courses including *The College Presidency*, *Leadership in Higher Education*, *Research Methods*, *Campus Environments*, *History of American Colleges and Universities*, *Small Liberal Arts Colleges*, and *Student Affairs Administration*, among others.

In addition, Ruth has served on the boards of Swarthmore College and the Humanity in Action fellowship program.

Ruth earned a Ph.D. in Policy, Management, and Evaluation (Higher Education) from the University of Pennsylvania, an Ed.M. in Administration, Planning, and Social Policy (Higher Education) from Harvard University and a B.A. in English, Education, and German (High Honors) from Swarthmore College.



Erin Meissner, Senior Associate

Erin brings to Storbeck Search more than 25 years of experience in both higher and secondary education, with a particular focus on undergraduate admission and college counseling. Past positions have included Associate Director of Admission, Director of College Counseling, Academic Advisor, and Independent College Counselor.

Before joining Storbeck Search, Erin served most recently as Chief of Staff of Bold Rock Partners, leading the start-up on all issues related to human resources and corporate culture. Previously, Erin was the sole proprietor of her own college counseling business, building a client list solely through referrals.

A passionate and committed volunteer, Erin has worked with Project Access, a nonprofit that provides vital health, education, and employment services to families living in affordable housing communities. Her work with Project Access focuses on developing a comprehensive college counseling program for at-risk students with a particular focus on college access for low-income students of color.

Erin earned a M.Ed. in Guidance and Counsel as well as a B.A. in English from Providence College.



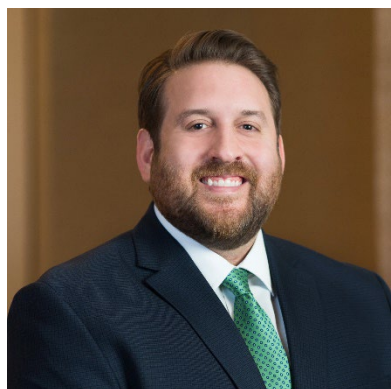
Erin Nicole Fadden, Senior Search Coordinator

Prior to joining Storbeck Search, Erin enjoyed more than twelve years in the admissions field of higher education. She held positions in application support and recruitment, including event planning, travel, and admission counseling for traditional first-time students, transfer students, and non-traditional students.

As a senior search coordinator at Storbeck Search, Erin has supported searches for public and private colleges and universities, including president, academic dean, and chief financial officer searches.

She recently helped bring the presidential searches for Boston University and Whitman College, as well as the Chancellor search for University of Pittsburgh to a successful close. Erin has also assisted in the successful closing of senior-level searches at Franklin & Marshall College, University of South Florida, and Pace University.

Erin earned a B.S. in Health Sciences from the University of the Sciences in Philadelphia.



Matthew D'Annolfo, Manager of Research

An experienced research associate, Matt provides timely support throughout the search process by gathering and presenting data, information, and marketplace trends.

Previously, Matt served as Associate Director of Admission and athletic liaison at Canterbury School in Connecticut and Associate Director of Admission and Financial Aid at Mercersburg Academy. He began his career in education as the inaugural admission fellow at St. George's School in Newport, Rhode Island.

Before his work in independent schools, Matt completed the University of Cambridge Certificate in English Language Teaching to Adults (CELTA) course in New York City.

Matt earned a B.A. in English from Central Connecticut State University.



Chi Chan, Senior Research Associate

As a member of the research team, Chi brings his passion for equity and access to research strategy, contextualizing systems of higher education to support the development of diverse candidate pools.

Prior to joining Storbeck Search, Chi served in multiple admissions roles, including as a Senior College Advisor for Bullseye Admissions and as an Admissions Reader for Yale-NUS College. His versatile skill set reflects his experience across higher education in research, advising,

and student services.

As a first-generation college graduate, Chi serves on the leadership board of the University of Virginia's First-Generation and/or Low-Income Alumni Network and supports alumni initiatives for recent graduates of his alma mater.

Bridge Preparatory Charter School: Principal

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Following on his academic journeys across Charlottesville, Virginia, and Philadelphia, Pennsylvania, Chi now calls the “wild and wonderful” state of West Virginia his home.

Chi earned an M.S.Ed. in Higher Education from the University of Pennsylvania. He also earned a B.A. in Economics and Politics from the University of Virginia.

The Storbeck Search Process

Across more than 1,000 searches, Storbeck Search has developed a five-step search and hiring process that has resulted in marked success identifying and securing leaders who thrive at the institutions they serve. Each step provides a framework for an intentional search that is attuned to the needs of the institution and to the marketplace of candidates. Within this framework, Storbeck Search will customize the process and develop the best path to identifying a Principal for Bridge Prep.

The five steps of our search process are: **Listening**, **Recruiting**, **Assessing**, **Referencing**, and **Hiring**.

Listening

Understanding, collaboration, and partnership are our watchwords as we approach our search process with you. To position you for success, we commit to partnering with the Executive Director and the search committee through the entirety of the search, and we begin by providing expert advice regarding:

- Search committee structure and charge
- Best process and timetable according to your needs
- Strategy and best practices for engaging constituencies in fruitful dialogue

To develop a strong sense of the opportunities and challenges facing the School and the next Principal, we will pose the following questions to all constituents, including faculty, administrators, staff, students, and others you identify as important to understanding the School:

- What is distinctive about Bridge Prep?
- What are your specific challenges at this time?
- What do your supporters hope to achieve in the future?
- What are critical attributes desired in the next Principal?
- What change do you want them to lead?

We synthesize the wide-ranging community feedback and use it to draft the position specification, which serves to:

- Provide prospective candidates with vital information and insights regarding the School and the opportunities facing the next Principal
- Focus the search committee on a common point of reference regarding goals, desired qualifications, and selection criteria for assessing candidates

Recruiting

We take a proactive and personalized approach to recruiting and developing a diverse candidate pool and inclusive process. While sharing the advertisement will draw responses, exceptional candidates must be researched and contacted with attention and care. To develop a robust and diverse candidate pool, we will:

- Draw on our broad networks and talk with individuals who can serve as sources of prospective candidates well matched to your search priorities
- Proactively recruit accomplished candidates who may not be looking for new positions
- Leverage our database and research skills to find candidates with strong ties to Bridge Prep and the region
- Seek out rising stars from a wide variety of backgrounds to ensure diversity and comprehensiveness of the candidate pool with regard to gender, race, ethnicity, and experience
- Research and pursue candidates from outside of education where desired
- Devise specific strategies to attract outstanding candidates who may need additional sensitivity to their circumstances and/or accommodations

Assessing

To aid in the committee's evaluation of candidates, we will:

- Proactively recruit and assess candidates continuously, using the criteria defined by the committee and laid out in the position specification
- Provide the committee with insights we gather from our conversations with the candidates, which may occur by phone, video, or in person
- Offer additional insights gathered in conversations about candidates and vetting through our shared internal resources

- Share all candidate materials and expressions of interest, encourage open and timely communication, and facilitate confidential tracking of candidates by means of a password-protected portal hosted on our website
- Support a rigorous interview process using standard interview questions and assessments
- Prompt a full and thorough discussion of the strengths, weaknesses, and qualifications of all viable candidates at each meeting with a clear framework to mitigate bias

Six-Step Referencing

Research shows that interviews are the least reliable indicators of a candidate's success in the job and, in addition, that most unsuccessful hires can be linked directly to poor or incomplete referencing. Storbeck Search differs from other firms in our unyielding adherence to the "no surprises" rule in search, which powers our approach to due diligence in a six-stage referencing process:

1. **Backgrounding:** Before we even speak to a candidate, we source prospects and their attributes with extensive internet research and leverage the data we have compiled in our comprehensive candidate database.
2. **Connecting:** In parallel with backgrounding candidates, we reach out to our contacts to ask specifically about the candidate in question – confidentially. We are able to do this and maintain confidentiality owing to our years of search experience and the strong networks we have developed. Our contacts trust us, and we trust them.
3. **Discovering:** After the committee has narrowed the candidate pool down to top prospects, we will conduct online presence checks and degree verifications. Working with a trusted vendor, we conduct a full review of all publicly accessible information (e.g., internet, news publications, student newspapers, blogs, social media) to identify any potentially negative information concerning these candidates.
4. **Traditional referencing:** We take this step typically after an initial (in-person or video) interview. We encourage the committee to play an active role in this outreach, and we develop a script and a list of questions based on concerns that were identified during the interviews. Reference reports are fully shared with the entire committee.
5. **Targeted referencing:** Here, too, we encourage the committee to play an active role. It is important to note that this stage of referencing is, like the others, carefully coordinated and structured so that the candidate remains informed about outreach, and we all know who is calling whom, when, and how. We have a highly trained staff of professional recruiters and reference checkers, and whether the committee is involved in this referencing stage or not, we

employ an appropriately aggressive referencing model to ensure that we explore all possible avenues of questioning, while balancing the need to be respectful of the candidate.

6. **Verifying:** Once the hiring authority has identified preferred candidate(s), we offer a full background check through a trusted vendor. The report may include: employment verification; civil and criminal legal review and checks; plagiarism checks; confirmation of veteran status as appropriate; national sex offender registry, etc. We share this report only with the hiring officer, as it contains sensitive financial information. If significant issues arise from the report, we make a recommendation to the committee to reconsider the candidate.

Hiring

Because we are committed to the long-term success of Bridge Prep, we remain in close partnership during the final phases of the search. As the committee prepares to make its recommendation, we will:

- Advise the hiring team on lead candidates' compensation packages and concerns related to the offer
- Assist in putting together the terms and conditions of employment for the final candidate
- Offer counsel for leveraging the positive impact of the announcement to lay the foundation for a successful transition
- Recommend best practices, such as a transition team, programs for new educational leaders, and executive coaches
- Provide advice, counsel, and follow-up with Bridge Prep and the hired candidate to ensure the placement's long-term success

Additional Services

Upon request, we offer strategic advisory services to aid in the successful completion of your search and support our placement and your institution beyond the date of hire. Our services are designed to help transformational leaders succeed and include independent leadership evaluation through the Hogan Personality Inventory assessment, executive coaching, onboarding and strategic advisory consulting, and connected leadership services.

If you are interested in learning more about the additional services we can provide throughout the search process and beyond, we are happy to elaborate on our offerings.

The Plan

Search Timeline

Everything we do is customized to your search. We will work with the search committee to develop a timeline that fits your needs and situation. Below is a possible timeline that can be adjusted as needed.

	Sep	Oct	Nov	Dec
LISTENING				
<i>Meet with search committee and key stakeholders</i>				
<i>Draft and finalize position specification</i>				
<i>Develop recruiting strategy</i>				
<i>Confirm search process and timeline</i>				
<i>Research top prospects and sources</i>				
RECRUITING				
<i>Gather candidate ideas and suggestions</i>				
<i>Begin recruitment phase</i>				
<i>Meet with search committee to discuss progress</i>				
<i>Evaluate prospective candidates</i>				
ASSESSING				
<i>Refine candidate profile and modify recruiting strategy as needed</i>				
<i>Continue to identify and recruit candidates</i>				
<i>Meet with search committee to review and select interviewees</i>				
<i>Interviews</i>				
REFERENCING				
<i>Conduct referencing and background checks</i>				
<i>Conduct off-list references and other due diligence</i>				
HIRING				
<i>Identify lead candidate(s)</i>				
<i>Lead candidate(s) meet(s) with others as appropriate</i>				
<i>Negotiate contract</i>				
<i>Plan announcement</i>				
<i>Announce new Principal</i>				

Fee Structure and Guarantees

Fees and Expenses

- The retainer for our services is set as one third of the placement's first-year compensation or at our minimum of \$65,000, billed over the first three months of the assignment and then adjusted upward at the end if needed.
- Indirect (administrative) expenses are 9 percent of the total retainer fee. Indirect expenses are search-related expenses including system database management, third-party technologies, and data and analytics that are difficult to attribute to individual projects. This fee is billed along with the retainer.
- All fully reimbursable expenses such as travel, advertising, printed materials, overnight delivery, and the services of a third-party vendor to perform background checks and press searches are billed at cost. The total cost for these expenses is driven by the search process and the decisions made by the institution. Direct expenses are invoiced as incurred on a monthly basis.
- If we are selected as your recruitment partner for this search, we will enter into a fee agreement that details our business terms and conditions including fees, expenses, and guarantees.

Guarantees:

- We will not recruit our placements.
- We will not recruit any person reporting to the placement for a period of one year after the completion of an assignment unless we receive approval granting an exception.
- If a candidate we place leaves the position within 12 months of their start date, we will reinitiate, for expenses only, a search for the same position and level as the original placement, under the following circumstances: (i) the placement's departure is for cause, or (ii) the placement resigns (for reasons that do not include a material change in the job requirements).

References

As strong believers in the power of referencing, we highly encourage you to contact the recent clients listed below to learn more about working with us.

Green Street Academy, Principal

Client contact: Denisha Logan, Executive Director, dlogan01@bcps.k12.md.us

Wagner College, multiple searches

Client contact: Mark Harmon Vaught, Chief of Staff, University of Pennsylvania Graduate School of Education, mthv@upenn.edu

Coversheet

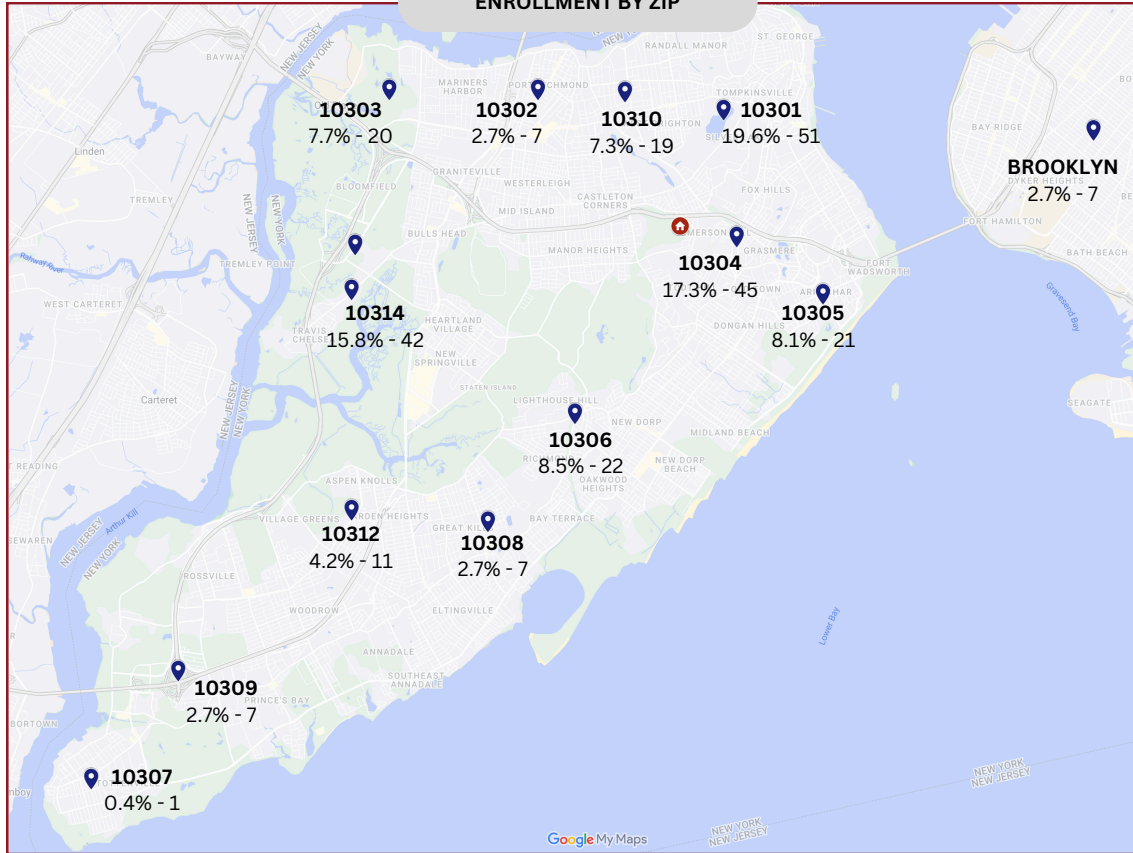
Enrollment Data Deep Dive

Section:	III. Monthly Deep Dive
Item:	A. Enrollment Data Deep Dive
Purpose:	Discuss
Submitted by:	
Related Material:	Enrollment Data Dashboard.pdf

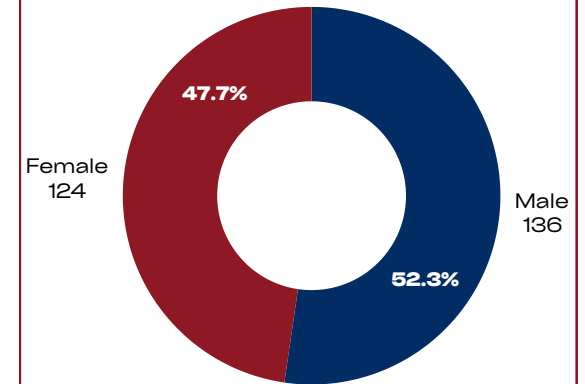
BRIDGE PREP

ENROLLMENT DATA

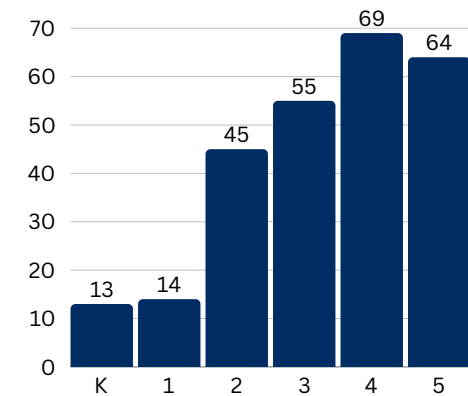
ENROLLMENT BY ZIP



ENROLLMENT BY GENDER

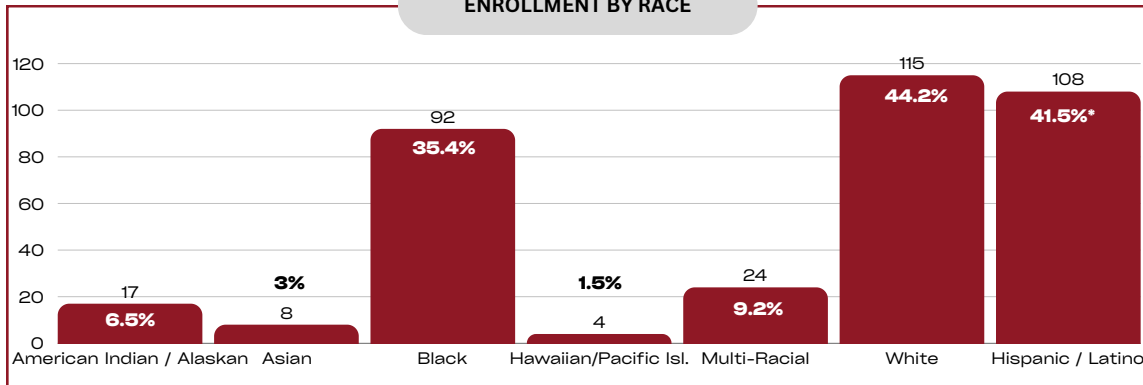


ENROLLMENT BY GRADE



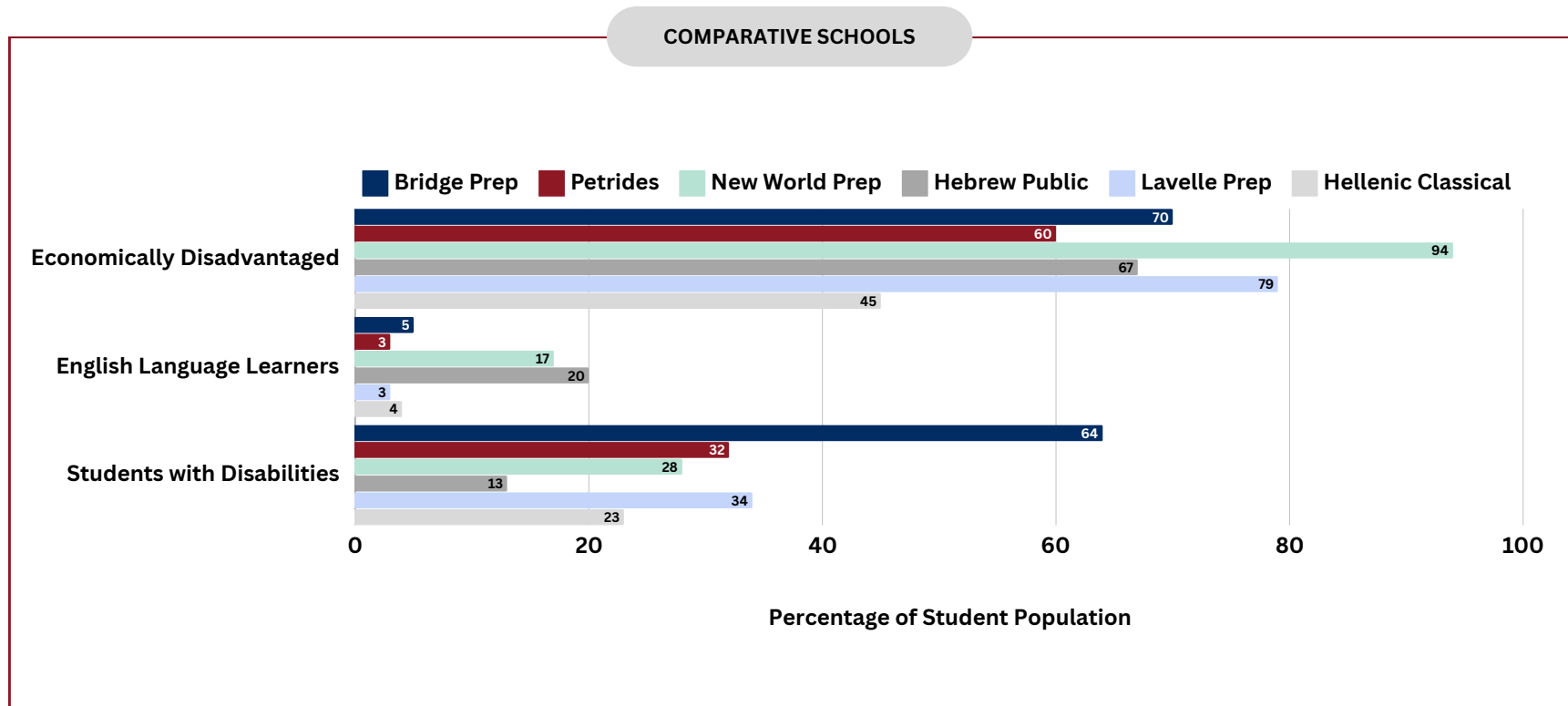
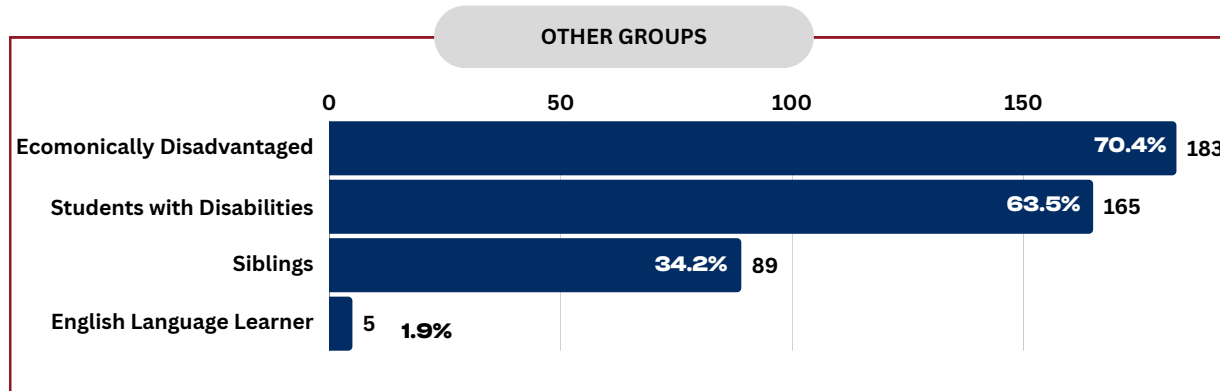
*Not included in percentage total.

ENROLLMENT BY RACE



BRIDGE PREP

ENROLLMENT DATA



Coversheet

Special Education Deep Dive

Section:	III. Monthly Deep Dive
Item:	B. Special Education Deep Dive
Purpose:	FYI
Submitted by:	
Related Material:	Special Education Data.pdf

SY24/25 General Education Special Education		
General Education Students	96	36.90%
Special Education Students	164	63%
Total Students	260	

SY24/25 Special Education by Grade			
Grade	# of IEPs	# of Students	Percent
K	6	13	46.00%
1st	5	15	33%
2nd	25	45	55%
3rd	35	55	64%
4th	47	69	68%
5th	46	64	72%

SY24/25 Special Education by Race		
Race	# of Students	% of Students
Black	45	27%
White	84	51%
Multi	18	11%
Native	13	0.08%
PI	4	0.02%

SY24/25 Special Education by FRL		
	# of Students	% of Students
FRL	107	65%

SY24/25 Special Education by Gender		
Gender	# of Students	% of Students
Male	98	60%
Female	66	40%

SY24/25 Special Education by Enrollment Status						
Enrollment	# of Students	% of Students				
New	52	32%				
Returning	112	68%				
SY24/25 Special Education by Testing Accommodations						
	# of Students	% of Students				
Accoms	128	78%				
SY24/25 Special Education by In Process IEPs						
	# of Students	% of Students				
In Pocess	6	0.02%				
SY24/25 Special Education by Classification						
Classification	# of Students	% of Students				
ASD	13	.08%%				
SLI	70	43%				
ED	1	0.01%				
HI	1	0.01%				
LD	56	34%				
OHI	22	13%				
SY24/25 Special Education by Related Services						
R. Service	# of Students	% of Students				
Speech	129	79%				
OT	102	62%				
PT	14	0.09%				
Hearing	1	0.01%				
SETSS	17	10%				

SY24/25 Special Education by Not Recieving Services		
	# of Students	% of Students
NRS	6	0.04%

SY24/25 Special Education by BOY ELA MAP		
K	# of Students	% of Students
Above	0	0
On	1	0.08%%
Below	5	38%

SY24/25 Special Education by BOY Math MAP		
K	# of Students	% of Students
Above	0	0.00%
On	1	0.08%%
Below	5	38%

SY24/25 Special Education by BOY ELA MAP		
1	# of Students	% of Students
Above	0	0.00%
On	2	29%
Below	3	43%

SY24/25 Special Education by BOY Math MAP		
1	# of Students	% of Students
Above	0	14.00%
On	1	0
Below	4	86%

SY24/25 Special Education by BOY ELA MAP		
2	# of Students	% of Students
Above	2	0.08%
On	1	0.04%
Below	22	88%

SY24/25 Special Education by BOY Math MAP		
2	# of Students	% of Students
Above	1	0.04%
On	0	0.00%
Below	24	96%

SY24/25 Special Education by BOY ELA MAP		
3	# of Students	% of Students
Above	2	0.06%
On	0	0
Below	27	77%

SY24/25 Special Education by BOY Math MAP		
3	# of Students	% of Students
Above	1	0.03%
On	2	0.06%
Below	26	74%

SY24/25 Special Education by BOY ELA MAP		
4	# of Students	% of Students
Above	3	0.06%
On	5	11%
Below	34	72%

SY24/25 Special Education by BOY Math MAP		
4	# of Students	% of Students
Above	2	0.04%
On	2	0.04%
Below	39	83%

SY24/25 Special Education by BOY ELA MAP				SY24/25 Special Education by BOY Math MAP			
5	# of Students	% of Students		5	# of Students	% of Students	
Above	2	0.04%		Above	2	0.04%	
On	13	28%		On	3	0.07%	
Below	27	59%		Below	38	83%%	
SY24/25 Special Education by NYS ELA				SY24/25 Special Education by NYS Math			
LY 3	# of Students	% of Students	21	LY 3	# of Students	% of Students	23
Level 1	7	33.00%		Level 1	7	30.00%	
Level 2	10	48%		Level 2	10	43%	
Level 3	4	19%		Level 3	4	17%	
Level 4	0	0		Level 4	2	0.09%	
SY24/25 Special Education by NYS ELA				SY24/25 Special Education by NYS ELA			
LY 4	# of Students	% of Students	30	LY 4	# of Students	% of Students	32
Level 1	14	47.00%		Level 1	14	44.00%	
Level 2	13	43%		Level 2	12	38%	
Level 3	3	10%		Level 3	6	19%	
Level 4	0	0		Level 4	0	0	