



MCCPS Board of Trustees

Board of Trustees Monthly Meeting

Amended on April 28, 2020 at 1:04 PM EDT

Date and Time

Tuesday April 28, 2020 at 7:00 PM EDT

Location

Remote Meeting

Topic: Board of Trustees Meeting

Time: Apr 28, 2020 07:00 PM Eastern Time (US and Canada)

Join Zoom Meeting

<https://us04web.zoom.us/j/3898394128?pwd=QndLYk9jVjcyNEJ5dXZGRWhnMDhSUT09>

Meeting ID: 389 839 4128

Password: MCCPS

Agenda

	Purpose	Presenter	Time
I. Opening Items			7:00 PM
Opening Items			
A. Record Attendance and Guests		Karl Smith	
B. Call the Meeting to Order		Artie Sullivan	
C. Accept Remote Participation	Vote	Artie Sullivan	3 m
In light of the ongoing COVID-19 coronavirus outbreak, Governor Baker issued an emergency Order on March 12, 2020, allowing public bodies greater flexibility in utilizing technology in the conduct of meetings under the Open Meeting Law. This committee makes a motion to accept this Executive Order for this meeting of the Board of Trustees, on April 28, 2020.			
D. Approve Minutes	Approve Minutes	Karl Smith	2 m
II. Public Comment			7:05 PM
A. Public Comment	Discuss	Artie Sullivan	10 m
III. Review of Previous Meeting Action Items			7:15 PM
A. Review of Previous Meeting Action Items	Discuss	Artie Sullivan	

- Identify potential candidates for the Board – Goal is 3 new members for SY 2019-2020 and SY2020-2021. Areas that need representation on the board –
 - Alumni
 - Parents of families residing outside of Marblehead.
 - Development

IV. Board Annual Items

A. Upcoming Meeting Agenda Items FYI Artie Sullivan

- March – Set up Satisfaction Survey, Set Annual Board Retreat Date (6/6, 8 yes, 6/13, 9 yes, 3 no response)
- April – HOS Goals Presentation
- May – HOS Annual Evaluation, Budget Adoption
- June – Annual Board Retreat
- July - Adopt Annual Report and Student Opportunity Act 3-year Plan, by July 31, Adopt Annual Board Goals
- August – Adopt HOS Goals, Open Annual Board Self Assessment
- Sept – Review Annual Board Self Assessment, Approve Committee Memberships and Vice-Chairs
- Oct – Adoption of the Annual Audit (must be done by Oct 31), MCAS Presentation
- Nov – Presentation on HOS Evaluation Process by the Personnel Committee, Adoption of the Strategic Plan,
- Dec –
- Jan – HOS Mid-year review
- Feb

B. Board Goals for SY 2019-2020 Discuss Artie Sullivan

Goal-1 (Strategic Plan Implementation):

- Define and adopt a 3-year strategic plan that is fully aligned with the mission of MCCPS. To include full implementation of year-1 objectives as defined in the plan and staging for the subsequent year. **Adopted Nov-2019**

Goal-2 (Board Health & Sustainability)

- Continue to build and develop a strong and diverse board to ensure the long-term health and sustainability of MCCPS, through creative mentorship and training programs (in collaboration with governance committee). To include identification of 2-3 new board members SY 2019-2020.

Goal-3 (Development)

1. Funding Streams
2. Grants & Fundraising
3. Board Responsibility

Goal 4 (Communication and Community Development)

- Strengthen the engagement with key stakeholders (e.g. Head of School, Parents, Students, Educators, PTO and Community) to support the growth and development of MCCPs role within the community and enhance the ongoing school initiatives and fundraising efforts. To include fostering a strong working relationship between the Board of Trustees and HOS to drive implementation of the 2019 strategic plan and ensure the long-term success of MCCPS.

Goal-5 (Bylaws Review)

V. HOS Report **7:15 PM**

Academic Excellence Committee

A. Monthly Report FYI Peter Cohen 20 m
 HOS to share monthly report.

VI. Other Business **7:35 PM**

A. Annual Goals Presentation by Head of School Discuss Peter Cohen 20 m
B. Presentation of HOS Evaluations Discuss John Steinberg 20 m

Presentation of Val-Ed and Board on Track Head of School Evaluations

VII. Committee Updates**8:15 PM**

Board

A. Governance Committee	Discuss	Karl Smith	10 m
Update on member documentation			
B. Finance Committee	Discuss	Rudi Herve	20 m
C. Personnel Committee	Discuss	Artie Sullivan	
D. Academic Excellence	Discuss	Jessica Xiarhos	
E. Development	Discuss	Ellen Lodgen	5 m
F. Strategic Plan Committee	Discuss	Fred Ferris	2 m
G. Communications, and Community Relations Committee	Discuss	Ian Hunt	5 m
H. Charter Renewal	Discuss	Artie Sullivan	2 m
I. BY Laws Task Force	Discuss	Stephen Veiga	2 m

VIII. Public Comment**9:01 PM**

A. Public Comment	Discuss	Artie Sullivan	5 m
--------------------------	---------	----------------	-----

IX. Board Member Comments and Resolutions**9:06 PM**

A. Board Member Comments and Resolutions	Discuss	Artie Sullivan	3 m
This is an opportunity for Board Member Comments and Resolutions			

X. Closing Items**9:09 PM**

A. Recap Action Items	Discuss	Karl Smith	2 m
Clerk to review actions items, add any additional items discussed.			
B. Meeting Evaluation	Discuss	Artie Sullivan	3 m
Discuss how meeting went, did we stay on topic, meet goals, etc.			
C. Adjourn Meeting	Vote	Artie Sullivan	

Cover Sheet

Monthly Report

Section: V. HOS Report
Item: A. Monthly Report
Purpose: FYI
Submitted by:
Related Material: HOS Report to Board of Trustees 4_23_20.pdf



Marblehead Community Charter Public School

17 Lime Street Marblehead, MA 01945

Tel: 781-631-0777 Fax: 781-631-0500

Web: marbleheadcharter.org

HOS Report to the Board of Trustees

Submitted by Peter Cohen, Ed.D

April 23, 2020

- Staffing Updates
 - Openings: special education teachers
 - Share list of Returning Staff & Resignations, Non-Renewals
- Enrollment
 - No Change since last month. Enrollment remains at 207
 - Projected enrollment for 2020-2021 is 220 students
- Future Planning
 - Budget Development Process underway
 - Using enrollment of 210 for planning purposes.
 - Handbook revisions needed - summer 2020
- Coronavirus - school closure - Now through the end of the school year
 - What we know
 - Steps taken during extended school closure
 - Looking ahead
 - End of year checklist
 - Pick up belongings and clean out of classrooms
 - Online Auction fundraiser
 - Summer School
 - Precautions for next year

Cover Sheet

Annual Goals Presentation by Head of School

Section: VI. Other Business
Item: A. Annual Goals Presentation by Head of School
Purpose: Discuss
Submitted by:
Related Material: Head of School Report - Evidence for Evaluation April 2020 (1).pdf

Head of School Report: Evidence for Evaluation

Peter Cohen, Ed.D. • 04.28.2020

Overview

Evidence for Evaluation

July 2019-April 2020

Progress Toward Goals

- Effective Entry & Direction Setting
- Maintain Momentum During the Transition
- New Charter Public School Leader Program
- Instructional Coaching & Teacher Evaluation

Progress Toward Standards

- I. Instructional Leadership
 - II. Management & Operations
 - III. Family & Community Engagement
 - IV. Professional Culture
-

Progress - Professional Practice Goal: Effective Entry & Direction Setting

Identification of Critical Needs

- Enrollment
- Funding
- Communication
- Leadership
- Trust
- Teacher Development

Execute Goals of Strategic Plan

- Students
 - Working Groups: Exhibition & Upper School
 - Enrollment/Recruitment
- Faculty & Staff
 - Hiring - start early
 - Criteria for Excellence
- Community
 - Communication
 - PTO & Development
- Operations
 - Facilities
 - Policies & By-Laws

Progress - School Improvement Goal: Maintain Momentum During the Transition

Accomplishments

- Charter Renewal
- New ESL Teacher & Systems
- New PTO Liaison
- New Leadership Team Structure
- Policies & By-Laws Updates
- New Marketing & Communication Strategy

Reorganization: Set Course for Future

- Leadership Team
 - Head of School
 - Principal
 - Director of Student Services
- Present & Future Systems Updates
 - Meeting Protocols
 - Interventions & Supports for Students
- Facilities & Program Upgrades
 - Performing Arts = Construct a Theatre
 - Declutter: Cosmetic Improvements
 - Develop Plan to address Deferred Maintenance

Progress - Professional Practice Goal: New Charter Public School Leader Program, MCPSA

Benefits

- Network
- Resources
- School Visits
- Mentorship & Coaching
- Support

Progress - Student Improvement Goal: Begin the Process of designing an effective plan for instructional coaching and Teacher Evaluation

Progress

- Protocol for Observations and Feedback
- Introduction of “Teaching Force,” a system borrowed from The Netherlands that establishes framework for peer observation and peer-to-peer support
- Progress derailed by Coronavirus, but we are set up for success next year.

Attention Areas → Future Goals

Recruitment & Enrollment

- Improved Marketing
- Full enrollment by 2021-2022

Development & Fundraising

- Pursue Grants and Major Donors
- Community Partnerships & Sponsorships

Facilities & Program Upgrades

- Address deferred maintenance and building expansion opps.
- Expand arts program and upgrade Exhibition

Standards

Standard I: Instructional Leadership

Curriculum:

- Year 1: Learn about impact of teacher autonomy on instruction & learning
- Year 2: With Principal, work with teachers to ensure effective and rigorous standards-based units of study

Instruction:

- Classroom observations and expectations for teaching have been shared. More professional development and instructional support (coaching) is needed.

Assessment:

- Use of data tracking tool introduced. MCAS, IXL, and Grades will be triangulated. (Impacted by coronavirus, extended school closure).

Evaluation:

- In progress (Impacted by coronavirus, extended school closure).

Data Informed Decision Making:

- Use of data tracking tool introduced. MCAS, IXL, and Grades will be triangulated. (Impacted by coronavirus, extended school closure).

Standard II: Management & Operations

Environment:

- Bring the sparkle back: Declutter the classrooms and the warehouse

Human Resources Management & Development:

- New Leadership Team structure in place for 2020-2021. Can't Wait!

Scheduling & Management Information Systems:

- Working on updates to master schedule. Coronavirus will have an impact.

Law, Ethics, and Policies:

- Trained during new leader cohort sessions, webinars, worked with new school counsel.

Fiscal Systems:

- The business manager has been outstanding in providing information. Collaboratively adjusting line items and working under conservative enrollment projections in order to remain in good financial standing through a challenging economic time.

Standard III: Family & Community Engagement

Engagement:

- Maintain an open school while ensuring safety and security during the school day. Visitors welcome to attend community meeting, join us for lunch, and visit classrooms.
- Meetings with parents have taken place throughout the year, as needed to keep the flow of information open.

Sharing Responsibility:

- Will continue to solicit feedback from the community through surveys and in-person meetings/coffees

Communication:

- A strength of the year. Improved Website and use of social media to tell our story.
- Weekly newsletter with information and promotion of events and school happenings.

Family Concerns:

- Assumed responsibility as point person for student discipline following the resignation of the assistant head of school. Proactively inform parents of student concerns and work collaboratively to address these concerns.

Standard IV: Professional Culture

Commitment to High Standards:

- Theme of the year: Opportunity.
- Professional attire for staff, declutter classrooms & storage, improve Exhibition.
- Working Groups assigned to upgrade our work

Cultural Proficiency:

- English as a Second Language Teacher hired, protocols updated.

Communication:

- Regular communication with all key stakeholders.

Continuous Learning:

- More work needed to develop comprehensive plan for professional development and growth

Shared Vision:

- The entire year has been focused on this element. Listening & learning turned into vision. Now building trust and buy-in.

Managing Conflict:

- Leadership during the COVID19 school closure. Navigated sudden departure of former school leader.
-

Next steps

New Leadership Team

Take advantage of time in late spring and early summer to develop comprehensive plan for 2020-2021.

Professional Growth & Development of Faculty

More time: Summer planning, Wednesday Afternoon PD Sessions

Fundraising & Recruitment of Students/Staff

New Director of Development and grant writing

Facilities and Program Upgrades

Cosmetic Upgrades. Deferred Maintenance Addressed. Expansion.

Overall Progress

1. Navigated challenges. Led with integrity.
2. Communication & culture improved.
3. New direction. New Leadership Team.

Set up for success. Let's Go!

It's a great day to be a Navigator

Cover Sheet

Presentation of HOS Evaluations

Section: VI. Other Business
Item: B. Presentation of HOS Evaluations
Purpose: Discuss
Submitted by:
Related Material: BoT Evaluation Report 2020.pdf
DR PETER COHEN Individual Report 2020.pdf
Head of School Evaluation Year End Form, 2020 template.docx
VAL-Ed BoT Pres 2020.pdf

Summary

LEGEND

- 1 — Unsatisfactory
- 2 — Some expectations met
- 3 — Meeting expectations
- 4 — Exceeds expectations
- 5 — Far exceeds expectations

* — To preserve anonymity, results are not displayed until there are 2 or more respondents.

Demonstrating Integrity



Cultivating a Culture of Excellence



Driving Academic Excellence/Student Performance



Leading the Educational Program



Developing and Leading Staff



3% didn't know

3% didn't know

Managing Organizational Compliance and Administration



5% didn't know

Building and Maintaining Family Satisfaction



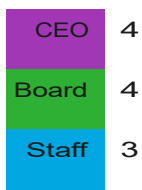
10% didn't know

Managing Financial Performance



28% didn't know

Actively Promoting the Organization and Ensuring Adequate Resources



3% didn't know

19% didn't know

Ensuring Adequate Facilities



8% didn't know

Partnering with the Board



Engaging the Community



Overall Leadership and Performance



What are your most significant accomplishments and/or strengths demonstrated this year?

CEO

Ushered the school through the Charter renewal process. Updated the communications strategy: updates to website, expanded use of social media, weekly newsletter. Working with Board to expand the use of the Board on Track platform. Initial stages of a teacher evaluation system have been established. Peer observation protocol will be in place as a cornerstone of a plan for improving instruction at our school next year. The groundwork for this is in its initial stages. Reorganized the leadership team. Made difficult and necessary staffing changes. The school already runs more efficiently since these changes were made. Strengths: Communication, vision, leadership, community relations and renewed commitment to high expectations.

Board Members

Through the use of the entry plan, Peter has begun to implement the results of the meetings and observations. Since Peter's arrival, MCCPS has completed the Charter Renewal Process and adopted a Strategic Plan.

Peter's view of the organization and restructuring of staff have been significant in the development of the strategic plan.

Quickly acclimated to the strengths / weakness of school in preparation of charter renewal exercise.

work.

I believe that Peter's ability to hit the ground running and getting the program back on track was a monumental achievement.

Rebuilding a positive relationship between the HOS and the staff Strengthening the special ed department and its policies and procedures Encouraging teachers to have their classrooms open to other teachers to share their craft Hiring a principal to focus on a rigorous curriculum and to support their success

Peter has been open, transparent and collaborative. For my part, I think that Peter has performed admirably. Collectively, as a Board, we had a good idea of what was broken within MCCPS. The Board hired Peter to help us fix what was broken. He has identified more inefficiencies than maybe even we knew existed. He has shared his findings with the Board and acted upon them with swiftness and integrity. In short, he has done exactly what we have entrusted him to do and I have every confidence that Peter will continue to do so. Onwards, Upwards and Keep Up The Great work !!

Dr. Cohen was able to jump right into the Charter Renewal process and identify weaknesses within the school and is making changes to address these needs, ie. staff/student retention, staffing changes, and school promotion/community outreach and engagement.

I think one of Peter's real strengths is identifying operational inefficiencies and proposing and implementing process improvements.

He saw the need to revamp the executive structure of the school and did it

Direct Reports

Navigating us safely through a pandemic

For the past couple of years there's been a task to upgrade/organize our warehouse but it wasn't done as a priority until Peter made sure it was.

An outsider transitioning from an original MCCPS leader like [REDACTED] is not an easy task. The school is also facing significant budget issues. Given this, I believe Dr. Cohen has done a good job managing the school's needs, all while also trying to become a part of what exists, rather than just changing the school to fit his vision.

Improved communication with staff and parents Got us successfully through the renewal process Made some difficult but necessary personnel changes

I think that Peter came into a new school that needed many updates and adjustments and he did it with care and energy. He observed the staff and the school during the first half of the year and allowed everyone to show him the systems in place. In the second part of the year, it seemed that he was able to then make more changes after he felt more informed and was able to see what worked and what wasn't working. I think it was a successful and fair approach and it will lead to even more positive change for the school.

All stated in the above comments, especially his first year here at Charter and to deal with these uncertain and crazy, scary times we all our going thru. Peter has been there for all every step of the way!

Excellent communication with our families and the community. Strong community outreach.

Taking action and making a decision before the Marblehead Public Schools shut down because of the corona virus. I was happy with how he made a decision for the students and staff's safety before the public school district was able to make a decision.

A strength would be his ability to organize and support the teachers and specialists during the remote learning process. He has been extremely supportive during this challenging time

1. Positive, supportive, and encouraging leader. 2. Charter renewal 3. He knows the staff and students well (he stepped into this role less than a year ago and learned quickly).

Excellent outreach and communication to students, staff, and community during emergency situations.

1. Recognizing the need for change in administration. 2. Being flexible during the "honeymoon" period. 3. Providing great leadership during the Covid-19 pandemic.

Undertaking the re-organization of management and vision plan. Reinforcing the school's mission of educating the whole child, and recognizing the fundamental importance of the arts in education.

Guiding us through a very tricky and difficult time without flinching!

NOTE

Peter has done a great job transitioning to our school. I hope the challenges of fixing all the issues don't cause him to run screaming. We need his leadership.

Developing a strong presence, taking a stand to let the community know he is at the helm. Cleaning out the hoarding situation in the warehouse. Fostering connections with community resources like Rotary. Bringing board and administrators to see other programs (I hope teachers will be next) Speaking calmly and respectfully with students to help them to realize their responsibilities and make better decisions for themselves rather than being authoritarian. Weekly meetings for accountability among key roles, positions.

Completing the Charter Renewal.

Keeping staff and families updated quickly as he has found out information.

Calm, consistent, straightforward leadership and communication.

He was able to move the whole school from a classroom setting to a online school without skipping a beat. He has been very approachable on any ideas we have to help the children.

transparency, leadership, attention, pragmatism, communication, proactiveness

Strong communication Leadership traits, including/especially with COVID19

Developing his clear and transparent communication with faculty and staff as he took on his new leadership role. Initiating positive dialogue and relationships with all employees to better understand the organization, its strengths and failures and maintaining an open door and demonstrating honesty and integrity throughout these efforts. Also, it was powerful to see Peter help the team to move forward from a challenging year and be able to help us to quickly refocus and begin work as a team to address the needs and challenges for the new school year in 2019/2020. After a turbulent 2018/2019 this was a major accomplishment and Peter showed strong leadership while also being respectful as he moved the team to start anew and bring back clear vision, leadership, follow through, trust and integrity to the role of the HOS.

Bringing some organization and "systems" back to Charter.

*Charter Renewal and Quarantine Leadership**Handling of this crisis of Covid 19*

Peter's leadership throughout the COVID-19 pandemic has been excellent. He attempted to engage with the local public school leadership, and has sought advice at each stage of the decision making process. He been proactive in his decision making.

Dealing with our current situation of school closures and virtual learning. I appreciate and am thankful that he set expectations that were flexible and understanding of everyone's (students, parents, faculty, staff) situation, mental health and ability to move to virtual learning.

The CEO manages to be direct and action oriented in meetings and when mediating between staff and/or parent communication. He is not afraid to say the things that need to be said when others tend to tip toe around news or comments that might be hard to hear.

What are the top three things you should do next year to move the organization forward?

CEO

Facilities Upgrades - a clear timeline and plan. Expanded fundraising efforts. Significant progress toward full student enrollment.

Board Members

A comprehensive development plan is one of the biggest goals for the next few years. Improvements of the facility is a priority of the Strategic Plan and coincides with a comprehensive Development Plan.

Begin a high quality teacher and student evaluation process. Continue to develop fundraising avenues. Look into quality professional development courses for staff.

Continue to invest in growth and retainment of key staff members, strengthen core fundamental academics (for students,) elevate student recruitment and retention (from local community), access new funding work streams, establish school as providing high performing (and differentiated) education experience.

Charter Renewal and Quarantine Leadership

1. Curriculum development 2. Increase enrollment 3. Facility plan

Oversee the building of a strong and consistent PD program for staff Invigorate the fundraising endeavors of the school Continue to work on recruitment and retention of both students and staff

Peter needs to continue to perform in the same vein that he has to date. Quick and decisive action. However, so far there has been "no rush to judgement". Peter has acted upon "best evidence" and our school will be the better for it. More of the same please!

1. Continue to identify and rectify and changes within the faculty to ensure high student expectations and academic success. 2. Fundraising/development 3. Student enrollment

1. Faculty and student retention. 2. Fundraising. 3. Measurable academic improvement in areas that were weak over the past few years.

retain strong staff, hire new well-equipped staff, and fund raise

Direct Reports

1. Continue work towards staff culture and retaining staff who are dedicated and high performing by offering monetary and non-monetary incentives 2. Optimize use of physical space 3. Continue with PR to get our story out there

1. Expand the school to accept more students 2. Better equipment/tools to get the daily tasks done the eliminate the need to hire contractors 3. Keep being a great leader

Manage the financial challenges that are coming with minimal impact on the school (easy to say)
Increase student population Fix the PD system

1) Set up an academic middle school plan that is attractive to parents and students. It seems a plan for various math paths and support is in the works, this is one way to support students, keep/attract others, and help teachers do their best jobs 2) Consider non-academic plans to retain 6-8th grade students. Many kids believe the grass is greener elsewhere - we should be more explicit with small ways to retain them/attract others 3) Determine a plan for 4th grade that focuses on intensive intervention in reading, ELA, and math so that in 5th grade the gap is significantly closed. There is a 90 minute Humanities block that could be used for more guided reading and strategic groups. More supports are needed for 4th - we don't lose too many students 4th - 6th, so it is worth the staff investment in 4th, as we may then need less in middle school.

The top three things he should do are to raise more funds in order to pay the staff more, paint/ix up many of the things and classrooms in the school in order to "update" it and make it look more modern. Also I think he could try to make more connections with the students or have them get to know him more.

1. Make sure all faculty and staff are performing to the standards they should be held to. 2. Faculty retention, keep faculty positive and support them in their classroom needs (provide additional staffing where needed). 3. Admissions support, student recruitment and retention.

With what I have seen so far and what I have heard from Peter for his vision for this school he needs to keep doing as he has been doing, full steam ahead!!!

1. More communication with staff 2. I wish there was more visits during class time for more observations and comments on what he sees as going good and what we could improve upon.

Listen to staff Listen to the students needs community, teacher, student education

1. Create a plan for enrollment, which he is working on 2. Fundraise money for expanding programs/the building 3. Create a pay scale for teachers and/or plan to retain highly qualified teachers through incentives

-Continue with open/candid communication with staff and community. -Work to retain valuable staff members and build positive rapport. -Recognize lawed systems to help re-structure but maintain Charter's unique approach to learning.

1. Continue to recognize the value of collaboration among teachers and the community. 2. Seek revenue to raise teacher salary to a competitive wage with other public schools in the area. 3. Continue to seek opportunities to expand the program into the arts.

Make sure there is a strong 5-year curriculum plan - including scope and sequence - in place for all subjects, so parents get a global view and understanding of the Charter education. This will also lead to less disruption and more continuity in learning when a new teacher is hired. Salary equity for staff, based on education and experience light in other public school districts. Work with students on building and developing a sense of pride and ownership of our school community.

Capstone year for 8th, exhibition 2.0, student return from 6th to 7th.

NOTE

While communication is strong, at times it can feel like staff find out things a little late. Part of this is a reflection on the past crappy communication. Peter would benefit from finding ways to loop staff in to at least calm anxiety and nerves. He is doing a great job, just a suggestion.

Foster better individual relationships within the building with classroom teachers. Use PD time well and in coordination with the plans created by PD committee. Identify big wishes for fundraising to take care of the building and future programming. If building a theater, build it ourselves-Do NOT partner with one specific theater program

Listen to the teachers and provide support and backup when necessary. Provide a more structured Professional Development program. Analyze the curriculum and use data more effectively.

1. Discipline protocols. Making sure everyone is on the same page.

Solidify finances, partnerships with outside organizations, ensure academic program consistency.

Always keep an open mind. Make sure he always have the teachers back. Make sure that anyone feels that they can talk to him about anything that is going on in the school.

fundraising, restructuring administration (underway), facility maintenance

Fulfill staffing needs (I. E. Adjustment counselor) , continued ongoing communication, incorporate progressive streamlined systems/policies

1. Evaluate additional steps to balance the support resources across each grade level and account for backup coverage when teachers are absent 2. Provide more professional development resources and ensure follow through from these sessions so that training has accountability for implementation going forward when PD schedule increases next year. 3. Help to improve student behavior and accountability to leverage student attention and participation in the classrooms and communicate these expectations in partnership with families.

Listen before making a declaration or announcement. Better knowledge of all staff don't make decisions about charter without having a conversation with the people that make up charter.

Grow enrollment and fundraising by differentiating MCCPS from Marblehead public schools

Communication is key Continue to market the school

Address inequitable pay for staff. Seek philanthropic funding from local businesses, rather than parents, staff and alumni. Increase staff and student retention.

Continue to communicate-letting faculty and staff know the what and why before communicating out to parents might be helpful in some situations. Continue to build enrollment and strong faculty staff.

I would like to see the CEO expose more of his personality to the staff. I find him hard to read and, therefore, less approachable. Also, figuring out how to transition the students back to school after quarantine is over, and show change that has occurred as a result of the staff task teams.

List any key challenges in the year ahead, for yourself and/or for the organization.

CEO

The new leadership team will need to gel quickly and then develop and execute a plan for professional development and improving systems throughout our organization. The development issue needs to be a top priority, as our budget is too tight to accomplish all that we want to do.

Board Members

Returning to a "normal" school community after the Covid19 closure. The closure may be an opportunity to review school operations, retain key values, and make adaptations to the routines if appropriate.

Financial limitations, staff and student retention, and marketing

Navigation of COVID19 challenges, staff/ student retention and funding raising. COVID19 may well require refocusing and reprioritization of MCCPs new strategic plan.

Work on getting test scores up to or above Massachusetts state standards

Fundraising Retention of staff and students Marketing and recruitment

Enrollment. Retention of both students and quality staff. Need to attract additional quality staff. Fundraising. Committee and Board member recruitment. Community "buy in" to the new and improved MCCPS. Building maintenance and the expansion of the physical space as a whole.

Changes in the administration as well as working to improve financial standing of the school.

1. Ongoing responses to the covid-19 global health pandemic. 2. Enrollment and student retention. 3. Developing more robust supports for students with special needs. 4. Increasing parent / faculty / staff engagement in school life and school culture. 5. Work with the new Principal to support teacher development and to tackle academic improvement.

grow student body

Direct Reports

Finding the "new normal" and supporting students, families and staff after the COVID-19 pandemic

Again, the budget and student population Integrating the new SPED Director and new (position of) Principal Addressing the note in the renewal about the composition of our student body.

1) Learning loss. Students with IEPs and low to begin with are going to be 6 months without support (at minimum). While the self starters are continuing to progress, the others are falling behind. Whatever gap existed just widened even more. 2) Financial. We have more needs, more IEPs, and less money. How do we make it work?

** The main challenge will be trying to keep everyone safe incase if another pandemic occurs. * Adding career discovery and exploratory programs.*

I think it will be a challenge to reorganize the staff with the new principal and new positions created. Hopefully the new staff hired will be a positive addition for the school but I think there needs to be more policies put into place for school wide discipline and what are the consequences for bad behavior. (Since there is no dean of students, I think it will be a challenge to see who will be able to tackle these responsibilities).

Right now I feel just getting our community and our great students back in school and back on track! Our teachers with Peter, again from what I have witnessed, are doing an amazing job with their students to keep them on the educational track they need to be and feel safe and that they are there for them and their loved ones!

Development and fundraising challenges with our current population. Explore new ways to raise funds. Make sure technology stays up to date - and get a new phone system! Recruitment and retention for both students and faculty.

Finding faculty that is as committed to the school as some of the veteran teachers were that are not returning next year.

Modified curriculum based on the modified school year How to reassess students after the modified school year Supporting specialists in regards to compensatory strategies

1. Covid 19 2. Enrollment 3. Finances

-Managing a new administrative team charged with leading the organization in the right direction. - Managing a "new normal" following health crisis and hiatus from in-person school attendance. -Possible issues with staff and student retention.

1. Working with a small budget that may be impacted by student attrition and the state budget after the Covid-19 pandemic.. 2. Shifting the focus towards a new model of the structure of the grades.

Finances and fundraising.

Budget, retention, reframing exhibition.

NOTE

Like I said before, Peter is cleaning up a huge mess. This school is not the amazing place it can be. I hope with the changes in the leadership team, that we can get back to an innovative place. That does not mean going back to the beginning but moving forward with new practices in education. He can do it, he is right for the job, it will just be a major uphill battle.

Money. Teacher salaries, building planning.(roof!) Revive enrichment classes

Everything is different now with COVID19. The budget is a main concern, attracting and keeping students, and creating and maintaining a positive school culture.

Getting back to school with behaviors after being away for so long.

Finances, enrollment, and transition from extended school closure

IF we stay as an online classroom how are we going to do creative teaching for our students and make us stand out from other schools.

fundraising, student retention, enrollment, condition of facility

COVID 19

- Increasing Faculty salary levels and insurance benefits to retain and attract top performing faculty - Physical space issues, expanding space for inclusion services, team meetings - currently we don't have enough space to meet demand.

student retention staff retention how to come back after the closing

Budget/enrollment

enrollment

Funding will be the biggest challenge, coupled with enrollment.

Enrollment, special ed challenges, finances

Quarantine, teacher/student retention, shifting the public perception about charter.

How often do you interact with the CEO?

#	Board Members	Senior Staff
Daily	4	14
Once or twice a week	0	7
Once or twice a month	4	4
Once or twice a quarter	1	0
Hardly ever	0	1

Details

Demonstrating Integrity

Deal with others in straightforward, honest and ethical manner.



Behave in a way that supports the organization's mission, vision and values.



Admit mistakes and take timely corrective action.



Treat others with dignity and respect.



Additional Comments or Examples

CEO

I strongly believe in open and honest communication and transparency as a leader. In terms of integrity, this means adhering to this strong belief even when conversations are difficult or news may not be well received. The organization knew there would be change with a new Head of School. In my experience,

people do not fear change, they fear loss. I have had to make difficult personnel decisions in my first year as HoS. I communicated these changes to the leadership team early and directly. We have added integrity to the essential habits that we want in our students and I believe I have modeled this continuously throughout this year. While everyone may not agree with my decisions, I have been open and honest about the why behind each decision. This has been true of not only leadership changes, but also student discipline. I have an open door and encourage anyone and everyone to speak directly with me, even if it is to express their concern over a decision. We have open conversations and I treat everyone respectfully.

Board Members

Overall, Peter has conducted himself professionally. The communication and handling could have been improved regarding instances of two staff members, 1 not returning 1 left after being told not going to be considered for a new position.

*Peter's communication with people is open and straightforward. He will disagree respectfully if he does disagree and is willing to engage in a conversation about varying ideas, He has gotten up to speed quickly with our culture and mission and has *it* in smoothly while still working on making the changes he feels are necessary.*

Always acts in a professional way with open and honest communication.

To date, Peter has demonstrated great honesty and integrity in his dealings with parents, staff, Committee members and Board members. His presence and cordial attitude at meetings is welcomed and appreciated.

I've been impressed with Peter's ability to respond calmly, clearly and respectfully to verbal accusations from frustrated community members who sometimes speak up during public meetings. It's not an easy thing to do and I think Peter has shown appropriate restraint during emotionally fraught moments.

Direct Reports

Peter has made some necessary changes, and change isn't always easy.

He's a very honest and understandable person.

Since becoming the Director of Food Service, Peter has done nothing but be supportive and helpful in every step of my new and great adventure.

He is the first to admit if he made a mistake and actively asks for our feedback on his performance and decision making. I feel he is very open to criticism and is a democratic leader.

Has been a model of several great strategies both in teaching and in interacting with students. Willing to accept mistakes. Owns breakdowns in communication. On a moment by moment basis he could communicate better-a compliment on a lesson or work display wouldn't hurt.

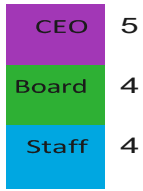
Dr. Cohen has been upfront and direct with students, teachers, and the community. There were some challenging moments when he announced personnel changes. While he was straightforward and clear about the decision, there was emotional discomfort about this change. I think Dr. Cohen was unaware of the extent of the discomfort. That unawareness contributed to the early departure of one staff member and several staff members not returning.

Starting on day 1 Peter sought input from every faculty and staff member as well as students, parents, alumni and community members. His door is always open and he schedules regular meetings with all. His communication with faculty and staff is transparent, positive and open for feedback and input. His communication with families is open, inviting and informative which is beginning to build a sense of community that has been lacking in recent years. Peter has provided a strong organizational plan to identify the most important improvements and continues to work with the team to build pathways to improve operations and programming by involving all faculty and staff on teams for regular improvement planning. Peter is an effective leader who provides room for everyone to take part in the process and supports individual faculty and staff members growth with active leadership. It is exciting to see the faculty and staff working together more effectively towards specific goals that Peter has identified in collaboration with the teams. His leadership, communication and organizational abilities will continue to strengthen our educational success and help us to gain a positive community presence to increase enrollment. He has brought more to the table in ten months than we have had in many years.

Peter frequently makes decisions without seeking input from all parties. This leads to a one sided perspective, which skews his decision making in favor of one person, or point of view.

Cultivating a Culture of Excellence

Create and maintain an organizational culture that promotes student achievement and college preparation for all students.



Make the organization a place where staff and students are all committed to excellence and believe that hard work is the key to achieving it.



Demonstrate commitment to competent communications and conflict resolution.



Consistently evaluate and proactively improve people, processes, programs, and services for greater effectiveness, efficiency and value.



3% didn't know

Additional Comments or Examples

CEO

Since August, I have strived to move the school to a place that has a new sparkle. I have placed emphasis on professionalism in all areas ranging from how we dress as a faculty to raising the bar for our expectations for students. We have begun discussions and taken steps toward upgrading the cornerstone of our program, Exhibition. We want exhibition to be more than a poster board, we want our students to be able to demonstrate their expertise to their peers and the community. The teacher evaluation process has been nearly non-existent prior to my arrival. I have initiated teacher observations with feedback. Prior to the extended school closure, we were getting ready to implement a peer observation protocol that would have continued my effort to increase the quality of teaching and learning in our school. We will

return to this in the fall. The entire year has been spent evaluate current programs, protocols and systems. In many cases, systems were broken, ineffective, or non-existent. We have made steady progress toward improving these systems. With a new, stronger leadership team in place, this will be an area of tremendous improvement over the coming months.

Board Members

Encourage Peter to continue to seek input and feedback from staff (all levels) to develop strategy and direction for the school. Strong engagement will help greatly in realization in Peter's aspirations for the school.

Not afraid to make the difficult decisions that are needed to help the school move forward.

Peter is committed to making Charter the best it can be. He has been consistently working towards having staff step up their performance. Although staff evaluation has been done more consistently than in the past, the closure interrupted the main flow of evaluation and feedback. I am confident Peter is committed to being sure our staff is strong and committed to our mission.

The feedback that I have had from both staff and faculty has been overwhelmingly positive. Communication, culture and processes have improved dramatically under Peter's guidance.

I responded "don't know" to the second question because I don't have regular contact with staff and students. I've been particularly impressed with Peter's willingness to dig into the administrative processes of MCCPS, and to envision and then work toward more efficient and/or forward-thinking versions of those processes. There is a balance new leaders need to strike between infusing existing organizations with new visions and ways of working, and retaining the core identity and essence of those existing organizations; from my perspective Peter is doing a great job at managing this balance.

Direct Reports

Peter has maintained a student-focused perspective from Day 1. He has managed to keep that perspective during this time (away), balancing the needs of the staff, the students and the parents.

Especially with what we are going thru at this time, Peter has demonstrated unbelievable leadership and guidance to everyone in every department to guide us smoothly thru this uncertain time!

Peter is encouraging and motivates everyone on staff but at the same time gives us useful suggestions in order for us to all become better educators.

Dr. Cohen sees the big picture and is a very encouraging leader.

None

Not much feedback on lessons, effectiveness except when being observed which has only happened once for me.

Peter has built consistency and participation back to all staff attending community meeting and lunches to ensure we continue to foster a strong sense of MCCPS Community. Prior to this oversight was lacking to provide sufficient supports to ensure our traditions were being supported fully. Peter has met with students in each grade to gather their input and vision for what they want to see from the students perspective. This has been a missed opportunity in recent years and with Peter's approach we have an opportunity to work to enhance programs to keep enrollment strong as students transition from 6th to 7th and 8th grade. Peter has fostered constructive conversations within the faculty teams to identify curriculum and teaching standards, foster a shared process for receiving feedback from our peers to improve teaching practices which has built momentum and strengthened our teaching teams. Collaboration and input is welcome and sought out in a positive and supported environment that Peter has fostered.

communication at times is still a bit inconsistent with regards to student and parent concerns.

See above

Driving Academic Excellence/Student Performance

All students demonstrate levels of mastery, which exceed grade level standards.



The organization creates, maintains and regularly revises systems and processes to drive student achievement.



The organization has met or exceeded agreed upon goals set for increasing student performance.



The organization is on track to outperform other public schools in our community.



Leading the Educational Program

Demonstrate thorough knowledge of effective curriculum, assessment, and instructional practices to close the achievement gap.





Ensure that the organization uses performance data to drive decision-making and curricular decisions.



Ensure there is a standards-based curriculum complete with scope and sequences for all subjects taught at every existing and expected grade level that exceeds national academic standards.



Ensure all teachers regularly use assessment data to plan curriculum, lesson plans, meet individual student needs, and make daily instructional decisions.



The organization's structure and staffing ensures that special student populations are making progress equal to those students in its regular education program.



Additional Comments or Examples

CEO

This is a work in progress and will be a high priority area of focus in the coming year(s). Current structures and a lack of professional development and training in the past has led to an uneven learning experience.

We will need to do more to get all teachers up to a level of high-quality instruction so that they all know the curriculum standards well and can develop learning activities and pathways for students that lead students toward high levels of achievement and progress toward mastery of these standards. The leadership structures and failure to provide the necessary training has led to pockets of excellence and pockets of inexperience in terms of quality instruction. I have implemented a system for tracking student progress and data. We utilize the MCAS, the data we gather through the IXL program which is now in place across all grade levels, and in-class performance assessments to evaluate student progress. With a new leadership team structure and a prioritized focus on improving instructional practices, we will be set up for gains in these areas.

Board Members

Improvements are being introduced regarding curriculum, assessments and teacher mentoring

Making staff changes and is in the process of bringing in interns from Salem State University to provide additional assistance.

Peter created methods to gather data in the beginning of the school year and is committed to using data to inform instruction. We need to continue to work towards these goals with all teachers, subjects and grade levels. Our staff is at different points in this goal and further PD is needed to help move us all along.

Peter has continually spoken of implementing structure and organization into MCCPS. To date, he has done a great job of recognizing and fixing those area that were severely broken and/or lacking.

Peter has recently made hires that seek to specifically address the needs of special student populations; as these new staff members join the MCCPS team I'm eager to see improvements in special student outcomes. Peter has also recently led a restructuring of the MCCPS leadership team, a decision that was not without pushback from the parent and faculty/staff communities, but I think that it will allow for greater focus on teacher learning, student and teacher assessments, and data-driven decision-making.

Direct Reports

This has clearly been Peter's strength so far...he has a vision for the school based on his years of experience, but it will take more than just 1 year to get us there.

Dr. Cohen is very knowledgeable and learns quickly.

None

It is my opinion that there is not a fair way to judge these statements. The needs of the Special Education students are too diverse and disparate. "Ensures there is a standards-based curriculum complete with scope and sequences for all subjects taught at every existing and expected grade level that exceeds national academic standards." - this seems entirely impossible to answer and impossible for one Administrator to achieve.

This year with a change in enrollment Peter worked to identify the needs across the teaching and support staff. He now has implemented additional resources including the school adjustment counselor and restructuring inclusion assignments to meet student needs. This has helped to stretch resources in a tight budget year.

I think that our inclusion model needs to be re-examined to help support students better. At times we do not either have enough staff or the right staff.

"Ensures there is a standards-based curriculum complete with scope and sequences for all subjects taught at every existing and expected grade level that exceeds national academic standards." We teach to state standards.

Developing and Leading Staff

Recruitment – Attract and select high performing staff and leadership.



Staff culture – Create a staff culture and work environment in which highly effective staff members are actively engaged and feel connected to the organization and its

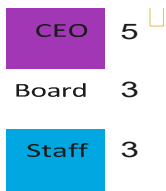
mission.



Professional Development – Develop, maintain, and regularly review and revise systems and practices that improve staff ability to increase student achievement.



Staff Retention – Successfully retain top performers. Create an environment where staff is committed to a long tenure and would recommend working at the school to others.



11% didn't know

13% didn't know

Additional Comments or Examples

CEO

I believe that staffing decisions cannot wait. I have acted efficiently and decisively to make changes to our leadership team. In the wake of these changes, I have acted quickly to build/rebuild trust and to retain the members of the faculty who both want to be part of this next chapter for our school and have the potential and willingness to commit to the effort it takes to continuously improve. The leadership team next year will have three prongs, with my position partnering with the principal and the director of student services. Together the three of us will lead the school toward improving systems, protocols, and the delivery of high-quality instruction.

Board Members

Peter has made some key hires in Administration and staffing that should assist in developing a strong faculty, student body, and community.

For the first year in this position I think that Peter has done an outstanding job in realigning staff and selecting new members.

Peter actively encourages teachers to participate in the improvement of the school. He has created work groups that teachers joined to work on various topics. He asked the teachers to join one or two groups and many wanted to join more, demonstrating their commitment to the school. Professional development is a work in progress and has already begun to improve with meetings targeted to specific issues. Peter has invited teachers to work on creating a strong professional development program. Staff recruitment and retention is a work in progress and it is a little too soon to comment on Peter's success in hiring strong teachers and retaining strong performers. Many teachers who were considering leaving this year have chosen to stay on because of a successful first year with Peter. Peter should also be applauded for the strength it took to make some difficult staffing decisions this year- whether or not I agree with them.

It remains to be seen if Peter has achieved this "goal". He has acted decisively and quickly to reorganize his leadership team, identify weaknesses within the school and make improvements to the very limited hand that he was dealt. It is to be hoped that High Performers will stay aboard and that the flotsam will be jettisoned, one way or another!. The 2020/21 school year will be a pivotal one for the future of MCCPS...no pressure:)

I answered "don't know" to the fourth question because I know Peter's recent decision to restructure the school's leadership team has led to a certain amount of staff turnover and uncertainty. Because I don't have much interaction with staff it's hard to tell how Peter's decisions will impact staff retention and culture. My sense is that Peter is working to build a culture of ongoing learning and improvement, and that faculty members who are excited about this type of culture will be motivated to stay and grow over time at MCCPS, but it's hard to know for sure without hearing directly from the faculty. My sense is also that Peter is fair but direct, so faculty members who are comfortable in that sort of culture will be excited about his leadership style, while faculty members who aren't as comfortable with direct feedback may be less likely to stay at MCCPS for the long term.

Direct Reports

We will see what quality of staff he hires through his process, though the new SPED Director seems excellent. We will see how [REDACTED] performs in his new position - I don't know about the other applicants for that job. I do not know who else is/is not returning next year.

In the short time Peter has been at Charter I am highly impressed with how he has jumped in and taken control of every aspect of the community and making changes to even better the school and its students

and their families.

— None

This is going to be a rough year. Peter came in with a lot of mess to clean up. Because of incredibly ineffective leadership for the last few years (including board oversight of previous head of school), many people were put into positions that were not right for them. They are good people, but not suited to their jobs. Peter is working to clean that up, but it is going to cause hurt feelings and cause some people to leave. For the good of the organization (students and school), it has to be done. Some people will mark Peter down for this. In reality it is because he is cleaning up one heck of a mess.

We continue to struggle with PD planning is often preempted with more immediate issues. Progress is being planned which is good-by changing the weekdays that we have PD, by scheduling PD topics far in advance, committing to that schedule I have confidence that this will begin to improve next year.

The staff meeting where [REDACTED] resigned due to what seemed like an intense example of miscommunication was one of the most uncomfortable situations I have ever witnessed. It was awful! Staffing decisions have been made unilaterally. Internal movement of personnel has been done without team input and people have been hired without having experience or certification in some instances.

Peter is working with [REDACTED] to revise the professional development system after taking time to understand the school resources and systems earlier in the year and has identified new initiatives for working towards providing effective and timely professional development opportunities. This has been a transition year in this respect however Peter has encouraged opportunities to participate in trainings offsite and online during this rebuilding period. Additionally, he has shared his own professional development sessions to introduce new opportunities to work across the faculty teams to provide more opportunities to learn from peer groups in addition to learning from outside sources. It is also important to note that during his first year Peter has had to evaluate staffing needs and handle the task of determining which staff roles should be retained going forward. This is something that has not been managed to its potential in the past so it is positive to see that Peter is fulfilling his role to hold staff accountable and better align resources to maximize teaching potential and use funds to reach optimal staffing. Though this process has been upsetting to some it is important to once again have sufficient oversight and leadership to manage our teaching resources effectively which will help us to retain and attract strong faculty candidates in the future.

Staff culture: Expectations and work loads vary widely between staff members. There is a lack of recognition of this, and a lack of support for staff with higher work loads. Professional development: This has been variable, and hard to judge on half a school year. I would like engaging, applicable PD. Staff retention: Uneven work loads and inequitable levels of pay are a deterrent to staff retention. Peter has publicly stated that he would be happy to replace underperforming staff. This was widely seen as a value judgement on the staff, and had a negative impact on staff morale.

Managing Organizational Compliance and Administration

Ensure that the organization meets and is in compliance with all local, state and federal laws and mandates.



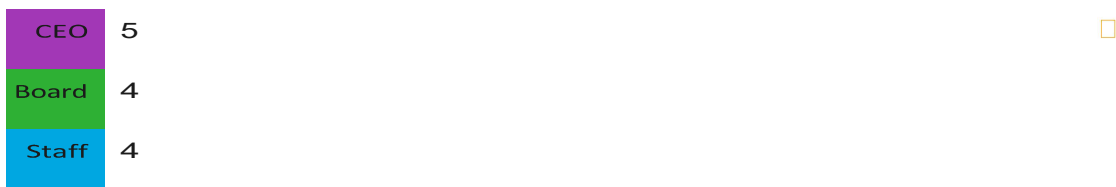
Oversee development and proper functioning of an enrollment and admission process.



Provide for the overall safety and well being of students and staff.



Ensure organization is administered well with efficient investment of staff time and other resources.



Additional Comments or Examples

CEO

This has been a fascinating first year as Head of School. I was able to come on board in the summer and lead the school through a successful Charter Renewal process that included the site visit in November and receipt of a renewed Charter in March. I have quickly developed a strong network of Charter school leaders throughout the state. I have participated in the new leader cohort through the state Charter association. I have been in touch with the DESE regarding the Charter renewal and the program review process. We are now in compliance with identifying and meeting the needs of English Learners. We had a strong recruitment/enrollment process in place. We have strengthened and continue to improve our marketing strategies. Through the recent health crisis that led to an extended school closure, I have demonstrated my leadership in ensuring the safety of our students and staff. I have also worked closely with our Business Manager to make prudent financial decisions to ensure we efficiently utilize our limited financial resources.

Board Members

Peters organizational skills are outstanding and he's reached out to various organizations including the state charter school association for guidance.

Peter has invested considerable time in enrollment and admission making sure we are reaching far and wide in several modes to recruit new applicants. He has also reviewed, revised, and instituted policies to be sure all the items above are done well.

MCCPS sailed through the Charter Renewal process with relative ease. A testament to the work of some very dedicated staff, Board members and Peter, who jumped on Board and together with the Board Chair, made it happen.

Peter showed excellent judgement and leadership around the closing of MCCPS in response to the covid-19 health crisis, and he continues to communicate clearly with the whole school community about continued closure and the health-related decisions and changes the school is making. I answered "neutral" to the second question, because enrollment (and retention) has been a major issue for the school over the last several years. This is an area I know Peter is focused on, and I'm not sure we yet have enough information about, or results from, his proposed changes to provide adequate feedback on his performance in this area.

Direct Reports

Peter has led all school teams from teachers to administration to fundraising and others I don't know. He has been all over admissions this year for obvious reasons. His calm demeanor is perfect for that position - I have not seen him get too up or down. He has reorganized staff meetings to make better use of everyone's time.

I felt that we were very prepared for the Charter Renewal and that was because of the prep and guidance from Peter.

Dr. Cohen provided all of the documents in order to ensure that the school is renewed, which took an abundance of work.

None

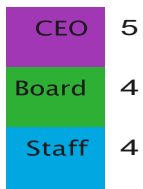
These areas are well delegated which is a positive-however, with the loss of the VP many of these compliance issues now fall on others and don't help to get the principal out walking around the school which is vital to the organizations improvement.

Some areas I would not know about.

I already spoke about efficient administration of faculty resources. Peter has developed a consistent schedule of operational review of budget and communicated the current needs and challenges to all staff. Additionally day to day safety and student oversight has improved with his efforts for us to supervise and improve student behaviors. Peter has been working to improve retention and recruitment by seeking best practices and this has helped us to have a proactive approach this year which has been absent in the past. Peter has also planned staff meeting time and pd time to maximize the work needing to be done with faculty and offered new working groups to focus on potential improvements in a variety of areas including upper school, scheduling, discipline, grading, portfolios and enrichment. This is a very positive action step to finally engage the faculty and staff to identify solutions and work with HOS to improve these areas. Now participation in the working groups leverages ideas and action items that will be implemented. This was not a proactive process in the past led by a top only approach and lack of action by former leadership.

Building and Maintaining Family Satisfaction

Ensure organization has frequent, meaningful, and well-attended ways for families to be involved in their child's learning and the school community.



Provide indication of a high level of parent satisfaction with the organization as evidenced by quantitative data and low student attrition rates.



27% didn't know

Listen and respond respectfully to the range of concerns expressed by parents and family members.



3% didn't know

Additional Comments or Examples

CEO

Effective communication and community partnerships has been a top priority for me this first year as Head of School. I have made myself accessible to parents and have encouraged the community to connect with me to share feedback. I will soon ask stakeholders to complete an annual satisfaction survey. Prior to that I have communicated at least weekly with the community through a digital newsletter and message. Additionally, I have hosted coffee sessions (in person and via zoom) and a state of the school presentation. I effectively implemented the entry plan I designed that was focused on listening and learning about our school. I have met with teachers, students, parents, community members, former faculty members, and town officials to learn about the school and community.

Board Members

Beginning with his entry plan, Peter has communicated with the key stakeholders of the community.

I believe Peter has made outstanding progress in his first year at the school. I'm sure you'll continue to grow the program.

Peter has reached out to families on many platforms to keep them informed about what is happening in school. He has held informative meetings and opens all meetings to questions and open discussions. We have not yet done the parent satisfaction survey to gather some data but I have heard some very positive comments from parents, both current and former. I am not sure about Peter's responses to the raising of parent concerns. I know he meets with anyone who wants his time but don't know how his responses to complaints are received.

Peter has been open, transparent and communicative to a degree not seen during both my time on the Board and my time as an MCCPS parent. Peter is to be congratulated for this. As I said above, the next school year will be the real litmus test for both Peter and the school.

I answered "neutral" for the first question because I don't have active interaction with current MCCPS families. Anecdotally I have heard from several families that they are very happy with the current school culture and leaderships. I also answered "neutral" for the second question, because student attrition has been an issue at MCCPS for the past several years, and we don't yet have sufficient information about Peter's approach to, and success with ensuring, student retention. This is a question I think I'll be better able to answer next year and into the future.

Direct Reports

Peter has increased school to home communication. Parents were very happy with the level of contact at the start of this (away) time. We will have to wait to see if anything has an impact on student retention.

I think one of his strengths is how well he communicates with families and parents. He also gives great suggestions and tips for how the teachers should also communicate with the parents. He listens well to parents' concerns but also is able to act as a liaison in difficult situations between some parents and teachers.

None

I would like to see Peter include faculty in more with parent concerns. Sometimes it appears he is the go-between, and that can lead to feelings of distrust amongst the faculty.

Family involvement opportunities need more interesting programing with parent centered timing. Family curriculum activities-math night, STEM night, art showcase nights would be a great improvement in those areas but teachers and parents need motivation to provide that programming . Still working on parent and student satisfaction and retention in middle school, it will take a few years. As local area schools improve their reputations parents are more willing to return to the town model or else are seeking more alternative programs (private)for middle school. On a positive note, as local students opt to go elsewhere in middle school we are able to provide those slots to students from Lynn and Salem etc where the public school model is sorely lacking. This opportunity brings us diversity and strong students who are looking for alternatives for their students, those students pull in their younger siblings which creates diversity in the younger grades as well.

In my opinion, decisions have been made to appease parents, but are not in the best interest of teachers.

Parents feel that they have the opportunity to share concerns and work towards resolution. PTO members and other parents are welcome to identify areas needing improvement and their input is valued and welcome. This is an area that is being explored further to further engage parents in effective ways and encourage connections and satisfaction with MCCPS.

"Listens and responds respectfully to the range of concerns expressed by parents and families." This is frequently at the expense of listening to staff.

Managing Financial Performance

Understand and provide leadership in the areas of financial planning, budgeting, accounting and management of the organization's financial resources.





Determine the current and future financial resources needed to realize the organization's mission.



Ensure that clear and accurate accounting, payroll, cash management, and insurance systems are maintained.



Oversee the development, maintenance, and regular revision of systems for capturing, managing, and analyzing financial data to improve performance.



Additional Comments or Examples

CEO

I have paid close attention to the school finances and partnered with our outstanding Business Manager who has brought me up to speed on 25 years of budgeting and financial management at MCCPS. We made difficult decisions early in the summer to leave some positions unfilled, including an inclusion teacher and school adjustment counselor position. These decisions allowed us to stay within our limited budget given the low enrollment. Our enrollment has remained steady this year and is projected to increase significantly for next year. This is essential for our financial viability given uncertain economic time is our state/nation. We have been carefully planning the FY21 budget while closely monitoring the economic conditions that could impact our bottom line. We have also been prudent about spending. I have reorganized the team to include a staff member who will focus on grant writing and development, as we need to access additional sources of funding beyond our operating budget be able to fully realize our vision for an improved school and school facility.

Board Members

Peter has been diligent regarding finances, given our current enrollment of approximately 205 students.

Peter, and the people he has tasked with these jobs, oversees everything about the financial health of our school. He has demonstrated a strong understanding of the budget process and what has to be done to maintain our budget.

Peter has shown himself to be competent in the handling, and well aware of the financial limitations that remain a very real burden to MCCPS. Peter has worked in concert with the Board Treasurer first [REDACTED], then [REDACTED], as well as [REDACTED], to come up with a budget that allowed the school to live within. An especially hard task given the massive shortfall in enrollment for the 2019/20 school year.

Peter has worked with the Trustees and administrative team to stick to a reduced budget this year, and the school is on track to close out the year in the black, despite loss of revenue from reduced enrollment. Peter clearly understands the need to increase enrollment and retention in the coming years to increase available funds, and has also begun to look creatively at other revenue streams (for example, renting an unused portion of the MCCPS to a long-term tenant).

Direct Reports

Everything seems to be OK. Peter has communicated some of the financial challenges with the staff but it appears next year will be tough so we have to see how that impacts the budget. The finances were part of the renewal process and I don't think the state had any concerns, at least nothing was mentioned in the report. I know he works closely with [REDACTED] and the Finance Committee to keep the school going.

None

We shall see where this leads us. Thanks to [REDACTED] we are able to maintain the systems and management as they are but the future holds huge expenses, roof and remodel are the greatest of these. Teachers are not paid a comparable salary to other public school districts which makes it hard to recruit and retain teachers. Field trips are limited unless funded by parents or grants from PTO which is prohibitive and discouraging.

The finances are a mystery to me and perhaps that is my own fault.

This area has nothing to do with me.

Actively Promoting the Organization and Ensuring Adequate Resources

Partner with the Board to develop effective public relations, marketing, and fund raising plans.



Coordinate efforts of the Board and its Development Committee to implement a board-approved fundraising plan.



Create partnerships with community organizations and businesses.



Pursue and secure philanthropic support that directly supports the mission and vision of the organization.



Additional Comments or Examples

CEO

While this has been a priority, we are far behind where I would like to be in terms of developing sustained, corporate partnerships. Our/my strengths this year have been in the area of communication and the increased use of social media (Facebook, Instagram, and Twitter) to promote our students, staff, and school. We had a 25th anniversary event in place that had to be canceled due to the health crisis. We need stronger support as a school/board with development. I have shifted the responsibilities for Susan Hauck and moving forward she will focus on grant writing and development. It is my hope that I will then be able to have more interactions with possible donors and corporate sponsors.

Board Members

A comprehensive development plan is one of the biggest goals for the next few years.

Area of major focus moving forward for the school - area for Peter to focus on in H2 2020 and beyond (stretch in light of COVID19).

Always making contacts in the community with various organizations to promote partnerships and possibilities for fundraising.

Peter has strongly inserted himself in the process of PR, marketing and fund-raising. He is committed to our success and has put systems and plans in place to ensure we succeed. He adds new ideas and creative visions to our plans and has put staff and policies in place to ensure continued growth. The pursuit of philanthropic support has not yet begun in earnest but is in Peter's plans moving forward. Peter has worked hard to become a partner with community organizations in order to spread the work about Charter.

Again, this part of Peter's work is "in progress". Peter is well aware of the need to raise funds through philanthropic outreach, this will be addressed in his "next steps" By reorganizing the leadership team, Peter has "freed" himself up to be able to carry out this part of his work. Moving [REDACTED] into a dual development/grant writing role will also (hopefully) aid the school in attracting much needed funding. Peter has reached out to local Town officials, School Dept. and the Rotary clubs and has does a great job of introducing himself to the Town of MHD and getting us out there in front of the public.

I answered "neutral" for the third and fourth questions, because these are efforts Peter has begun, but that haven't yet shown results.

Direct Reports

I don't know how closely Peter works with the board on almost anything. I do know he meets with the fundraising group on a regular basis, and had planned an event in April. He has been going to Rotary and talking with officials in the district.

None

I believe he is working on philanthropic coordination and I certainly appreciate his field trips to see how other schools and institutions coordinate standards and needs. Wonder when parents and teachers will become involved in the process as they are our best voices in recruiting students and money from other resources.

Again, nothing to do with me.

Ensuring Adequate Facilities

Oversee necessary facilities planning and make recommendations to the Board.



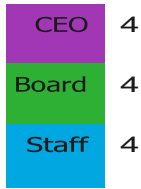
17% didn't know

Assure the proper maintenance of the organization's facility and adherence to all local, state, and federal codes.

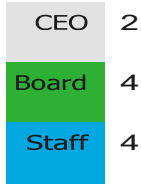


13% didn't know

Ensure the physical environment reflects the organization's mission and values as well as enhances learning.



The organization's physical environment (buildings and grounds) is well-cared for, sanitary, and promotes health and safety.



Additional Comments or Examples

CEO

We have a lot of work to do in this area. There are too many deferred maintenance projects. While our financial status is the obstacle to moving forward with these projects, we need to have a greater sense of urgency to raise the necessary funds and make the much needed improvements to our school building. Improvements include a new roof, an expansion into the warehouse, a new fire panel that is up to code, and a new phone system. I predict we will also need to make upgrades to our technology infrastructure (bandwidth capacity). Additionally there are many cosmetic upgrades (Paint, lighting, etc.) and decluttering that would go a long way to refreshing the look and feel of our school. We have made progress toward these goals, but they have been slower than I would have liked.

Board Members

Improvements of the facility is a priority of the Strategic Plan and coincides with a comprehensive Development Plan.

Preliminary planning has begun for maintenance and compliance with state and local laws.

Under Peter's leadership, our facility has seen many improvements that aid in our environment being a comfortable and clean place to learn.

Again, Peter, and the School is hamstrung by a lack of disposable income to be able to do any meaningful repairs, let alone improvements. We are all too well aware, and nobody needs to listen again to the litany of shortcomings that the physical building presents, however Peter has made inroads to the general appearance of the interior of the building. He has encouraged the "tidying up" of both the classrooms and the 'warehouse"... all in all, "A good start"!

Peter has been active in encouraging faculty and staff to make incremental improvements to the MCCPS facility through regular cleaning and pruning of stored materials; he has pointed out that these are improvements the school can make for free, and that can have a tangible impact on how organized and spacious the school can feel. He has also been working actively with a small committee of board members and parent volunteers to develop plans for a range of renovation and/or expansion options that would address current space constraints and improve the overall functionality and spatial character of the MCCPS facility. This effort is ongoing.

Direct Reports

Again, I don't know much about Peter's interactions with the board. He has been proactive about reminding teachers to keep their rooms organized and clean, as well as working with the facilities staff to improve the general state of the building. A note here in praise of Washington, who seems to do so much.

prioritized a clean and organized storage area

I think he did a great job at organizing the clean up of the warehouse and has made many plans to tidy up the whole building in general.

With what I have heard and witnessed Peter is ready to take the Charter community to the next level!!!

The warehouse is more organized!

None

Cleanout and organization of storage areas for teachers in the annex was a huge improvement and much appreciated. Office areas are improving and have an impact on parents when interacting during meetings, entry to the school. .At the same time it is important to retain the student centered ambience in the classrooms and community room. Keeping student murals, work areas, and gardens has been respectful so far and appreciated.

We do the best we can with what we have.

Funding is always impact the facilities.

Partnering with the Board

Act as liaison to ensure an effective flow of critical information between the Board and the organization's senior staff, teachers and students.



Help to facilitate the Board's governance, composition and committee structure. Implements Board policies, and recommends policies for Board consideration.



Develop and implement strategic and operational plans to achieve the organization's mission and vision; allocates resources accordingly.



With input from the Board, ensure the development and ongoing refinement of a long-term strategy; establish objectives and plans that meet the needs of students, staff, and all constituents; ensure consistent and timely progress toward strategic objectives.



Additional Comments or Examples

CEO

I believe we have made solid progress toward developing our relationship. The flow of information has been the area of strength. Where we need to improve is providing more direction to committees and establishing clearer goals that include checkpoints and deliverables throughout the year. We have a clear vision and common goals for our school. We have a strategic plan. Now we need to ensure that progress is being made and that each board member is helping us move the ship forward in the right direction. I look forward to building on our first year together.

Board Members

Since Peter's arrival, MCCPS has completed the Charter Renewal Process and adopted a Strategic Plan. The Committees are in need of recruiting new members. This is a duty born both by the Board and HOS.

Encourage Peter to leverage skills and experience of board more in key strategic decisions and planning.

Keeps the board abreast with all the things that he is doing to develop staff and students.

Peter has demonstrated his commitment to helping the Board run smoothly with a diverse composition, appropriate policies, and devotion to our mission. Peter maintains open communication with the Board, its members, and serves as a liaison to the families about Board processes.

Having Peter as both our HoS and a member of our Board has been truly eye opening. His input, demeanor, and overall collaborative manner has been refreshing. I really feel that the Board and HoS are a

real team and work as such. There is no defensiveness, no aggression, just the realization that we need to work together. As our relationship grows, I see only good times ahead for both the Board and Peter.

I think Peter has worked extremely well with the Board. His monthly updates are clear and informative, and I know he is in regular communication with the Board chair about any issues that surface at the school and that need immediate attention or Board perspective.

Direct Reports

I felt very informed and Peter always made it a point to communicate with the staff the important points from Board meetings.

None

The strategic plan that was put forward is not one that I believe best represents the future of the school.

Engaging the Community

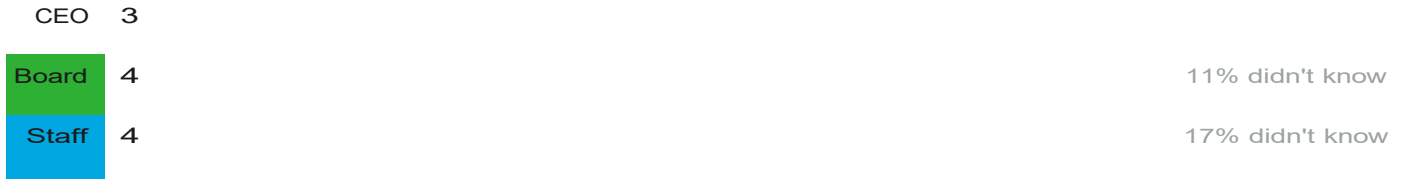
Serve as Chief Spokesperson for the organization, in coordination with the Board Chair.



Listen and respond respectfully to the range of concerns expressed by various constituents.



Develop and maintain effective external relationships that support the organization's performance and fundraising success.



Maintain communication with city and state officials.



Build strong relationships with relevant community organizations.



Additional Comments or Examples

CEO

I have worked hard to engage the community and also to provide numerous opportunities for community members to meet with me. In addition to the State of the School presentation, I also have joined the Rotary Club of Marblehead Harbor after I gave a presentation to that group about our school. I have met with current and past board members, current and past faculty members, and current and past parents, as well as a few alumni of the school. Our fundraising efforts need to improve. I have met with one of the former directors of development. I have also met with personal contacts that I have who work in the development field in order to solicit advice on fundraising and connecting with donors. I have met with the Town Administrator in Marblehead. I have not had a lot of success, despite numerous attempts at outreach, in connecting with school officials in Marblehead. It has been frustrating. I will continue these efforts moving forward.

Board Members

Peter has partnered with several community organizations to promote MCCPS. There is a need to focus on fundraising and philanthropic relationships. Peter is developing relationships with Town officials. A new Superintendent for Marblehead in an opening. Peter may want to developed relationships with Superintendents of our sending districts.

Great progress to date - good to see Peter building connections and networks. Good start.

During his limited time as the head of school he's reached out to various organizations and is building relationships that will benefit the schools program in the future.

Peter is committed to listening to the various school stakeholders- students, parents, staff, community, etc. He has joined organizations, ensured our presence in the press and communicates regularly with local officials.

Peter has been open, transparent and communicative to a degree not seen during both my time on the Board and my time as an MCCPS parent. Peter is to be congratulated for this. As I said above, the next school year will be the real litmus test for both Peter and the school. Peter has reached out to local Town officials, School Dept. and the Rotary clubs and has does a great job of introducing himself to the Town of MHD and getting us out there in front of the public.

As someone new to both MCCPS and to Marblehead and the Northshore, Peter has been working hard to build relationships with local officials, media outlets and community organizations. It seems pretty clear that his efforts aren't always being reciprocated, which is frustrating. He continues to pursue those relationships, and I'm confident he will establish those connections in time; it may just take a while for folks on the other end to respond. As I noted earlier, I'm particularly impressed by Peter's direct, candid and unflappable demeanor when interacting with the MCCPS community. He has done a great job of communicating enthusiasm about the existing culture and history of MCCPS while being honest about challenges it is facing and about the difficult decisions that the school may have to make to ensure the school's continued strength and viability.

Direct Reports

Peter has worked with staff to raise the school's profile in the community which is important, especially for admissions purposes.

Again, with all I have witnessed during these crazy times, Peter has been there every step with his staff and the Charter community!

None

Coming from a distant community, Peter has put forth enormous effort in getting to know local groups such as Rotary and Merchants board. Board recruitment has been strong, bringing in new voices while championing the mission of the school. This year has been an opportunity to renew relationships with town officials (including a changing of the guard in town)

Dr. Cohen has done a good job reaching out to various organizations. The fundraising and development continues to be a tough nut to crack.

Overall Leadership and Performance

Responsible for leading the organization in fulfilling its mission and goals in accordance with the policies established by the Board of Trustees.



Responsible for the success or failure of the organization. Provide vision and leadership by example.



Develop and implement strategic and operational plans to achieve the organization's mission and vision; oversee the operation of the organization, develop staff, allocate resources and ensure proper controls.



Oversee well-being of the entire organization by fostering positive and productive relationships across the organization and community.

CEO	4
Board	4
Staff	4



VANDERBILT ASSESSMENT *of* LEADERSHIP *in* EDUCATION™



Principal Report

Principal:	DR PETER COHEN	Date of Report:	04/27/2020
School District:	MCCPS	Date of Evaluation:	04/14/2020
Survey ID:	dd77f6	VAL-ED Form:	A
School	MARBLEHEAD COMMUNITY CHARTER PUBLIC SCHOOL		

Purpose of the Assessment

The Vanderbilt Assessment of Leadership in Education or VAL-ED is designed to provide a summary of effectiveness of a principal's learning-centered leadership behaviors during the current school year. A comprehensive picture of the principal includes input from teachers, the principal's supervisor and his or her own self-report.

The VAL-ED focuses on leadership behaviors defined by six core components and six key processes known to influence student achievement:

Core Components

- High Standards for Student Learning
- Rigorous Curriculum
- Quality Instruction
- Culture of Learning & Professional Behavior
- Connections to External Communities
- Performance Accountability

Key Processes

- Planning
- Implementing
- Supporting
- Advocating
- Communicating
- Monitoring

Respondents to the VAL-ED were asked: How effective the principal is at ensuring the school carries out specific actions that affect core components of learning-centered leadership. The effectiveness ratings, based on evidence, range from 1 (ineffective) to 5 (outstandingly effective) for each of the leadership behaviors.

This VAL-ED report addresses the questions of:

- (1) who responded?
- (2) what evidence was used to evaluate the principal?
- (3) what do the results say about the principal's current leadership behaviors?

The results are interpreted against both norm-referenced and standards-referenced criteria that highlight areas of strength and possible areas for improvement. A leadership development plan can be developed based on these results.

The VAL-ED provides technically sound scores when used as designed, however, it is recommended that it be used along with other information when making important evaluative decisions.

For more information about the VAL-ED, please visit our website: <https://valed.resonanteducation.com>.

Who Responded and What Evidence Did They Use?

	Possible Respondents	Actual Respondents	Percent (%) Responding
Principal	1	1	100%
Teachers	47	31	66%
Supervisor	13	7	54%

A response rate of greater than or equal to 75% is high, 50% to 74% is moderate, and below 50% is low. When response rates are low, resulting scores should be interpreted with caution.

Sources of Evidence

Ratings of a principal's behaviors should be based on evidence that is recent, relevant and representative. Evidence comes in many forms (e.g., observations of behavior, review of documents that record leadership actions and communications with people who have directly observed the principal's behavior). After reflecting on a sample of evidence, respondents' effectiveness ratings of leadership behaviors are behaviorally-anchored and more accurate. The graphs below summarize each type of evidence used as a basis for effectiveness ratings of the leadership behaviors. The bars display the sources of evidence for each item used by the principal and all teacher and supervisor respondents in the school. Percentages are based on number of items for which a source of evidence was checked; these percentages need not sum to 100 across sources.

Evidence Sources Used by Principal

Reports From Others		69.44%
Personal Observation		98.61%
School Documents		15.28%
School Projects or Activities		2.78%
Other Sources		2.78%

Evidence Sources Used by Teacher

Reports From Others		35.87%
Personal Observation		76.97%
School Documents		31.44%
School Projects or Activities		25.78%
Other Sources		13.37%
No Evidence		12.05%

Evidence Sources Used by Supervisor

Reports From Others		52.18%
Personal Observation		67.86%
School Documents		36.31%
School Projects or Activities		26.59%
Other Sources		31.94%
No Evidence		14.09%

What are the Results of the Assessment?

VAL-ED provides a total score across all respondents as well as separately by respondent group. The scores from the teachers are based on the average across all teacher respondents. The total score, core component, and key process effectiveness ratings are interpreted against a national representative sample that included principals, supervisors, and teachers, providing a **percentile rank**. The results are also interpreted against a set of performance standards ranging from **Below Basic** to **Distinguished**. The scores associated with performance levels were determined by a national panel of principals, supervisors and teachers.

Below Basic (1.00 - 3.28)	Basic (3.29 - 3.59)	Proficient (3.60 - 3.99)	Distinguished (4.00 - 5.00)
A leader at the <u>below basic</u> level of proficiency exhibits learning-centered leadership behaviors at levels of effectiveness that are unlikely to influence teachers positively nor result in acceptable value-added to student achievement and social learning for students.	A leader at the <u>basic</u> level of proficiency exhibits learning-centered leadership behaviors at levels of effectiveness that are likely to influence teachers positively and that result in acceptable value-added to student achievement and social learning for some sub-groups of students, but not all.	A <u>proficient</u> leader exhibits learning-centered leadership behaviors at levels of effectiveness that are likely to influence teachers positively and result in acceptable value-added to student achievement and social learning for all students.	A <u>distinguished</u> leader exhibits learning-centered leadership behaviors at levels of effectiveness that are virtually certain to influence teachers positively and result in strong value-added to student achievement and social learning for all students.

Overview of Assessment Results

The Principal's Overall Total Effectiveness score based on the averaged ratings of all respondents is 3.38. Remember, this score is based on a 5-point effectiveness scale where 1=Ineffective; 2=Minimally Effective; 3=Satisfactorily Effective; 4=Highly Effective; 5=Outstandingly Effective. The Performance Level and national Percentile Rank for this score are documented in the table below.

Overall Effectiveness Score		
Mean Score	Performance Level	Percentile Rank
3.38	Basic	24
The standard error of measurement is .05		

Summary of Core Components Scores				Summary of Key Processes Scores			
	Mean	Performance Level	Percentile Rank		Mean	Performance Level	Percentile Rank
High Standards for Student Learning	3.48	Basic	28	Planning	3.48	Basic	39
Rigorous Curriculum	3.35	Basic	27	Implementing	3.24	Below Basic	15
Quality Instruction	3.40	Basic	21	Supporting	3.34	Basic	14
Culture of Learning & Professional Behavior	3.66	Proficient	39	Advocating	3.50	Basic	48
Connections to External Communities	3.28	Below Basic	33	Communicating	3.51	Basic	36
Performance Accountability	3.33	Basic	32	Monitoring	3.21	Below Basic	17

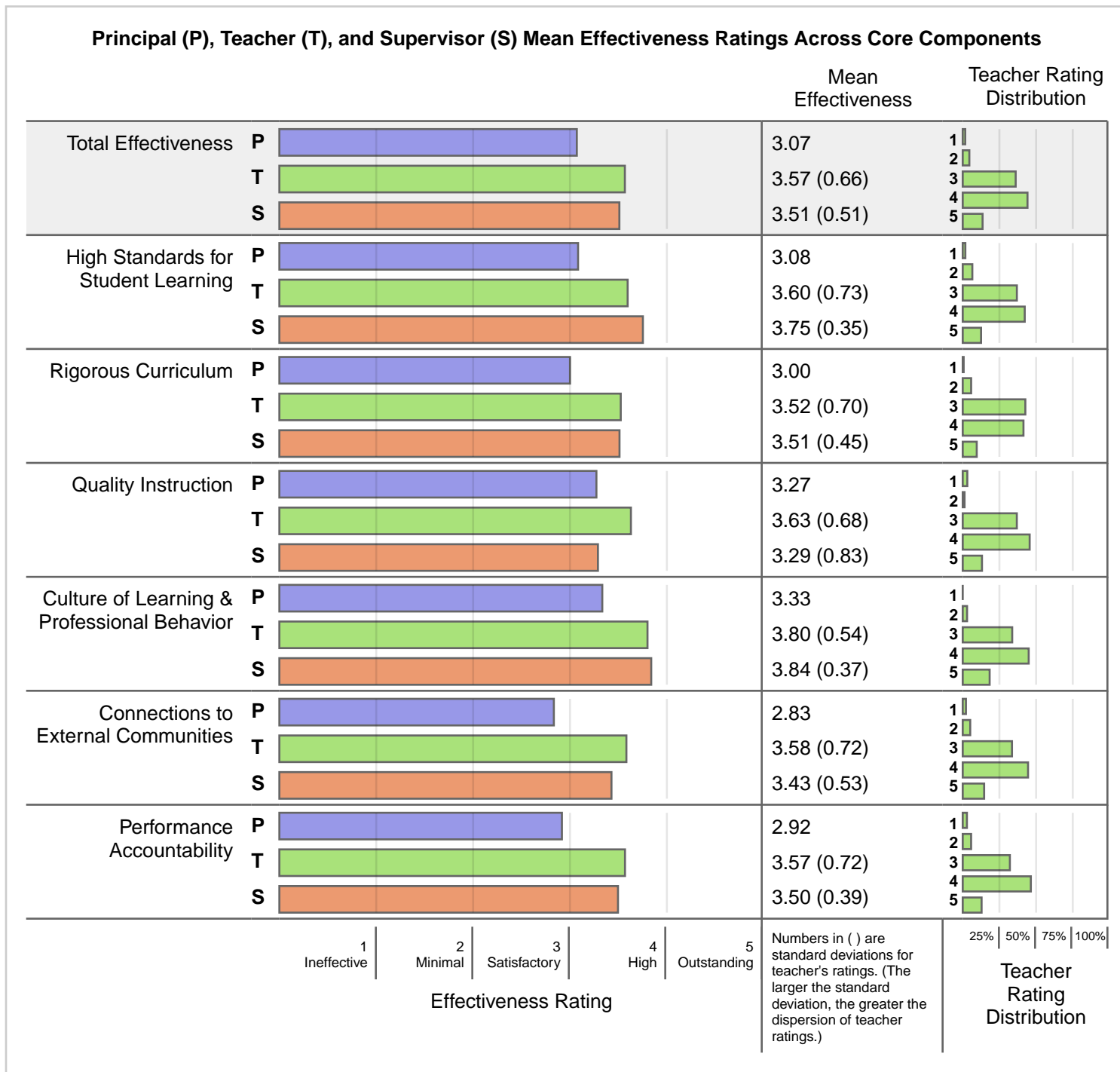
An examination of the principal's mean Core Components ranged from a low of 3.28 for Connections to External Communities to a high of 3.66 for Culture of Learning & Professional Behavior. Similarly the principal's mean Key Processes ranged from a low of 3.21 for Monitoring to a high of 3.51 for Communicating.

Assessment Profile and Respondent Comparisons

The principal's relative strengths and areas for development can be determined by comparing scores for each of the 6 Core Components and 6 Key Processes across different respondent groups. The next two graphs present an integrated visual summary of the results. They show the **Mean Effectiveness** associated with each Core Component and Key Process.

First, examine the profiles as recorded by each of the three respondent groups. These scores can be interpreted by

- (a) Comparisons among Core Components and Key Processes
- (b) Examination of scores among respondent groups
- (c) Comparisons to the mean effectiveness scale
- (d) Distribution of ratings among teachers



The ratings for a core component are based on twelve items. The higher the ratings, the more effective the leadership behaviors of the principal. When there are large differences between respondent groups, the focus should be on the results for each respondent group rather than the overall effectiveness score.

Assessment Profile and Respondent Comparisons (Continued)

The ratings of the six Key Processes are based on 12 items that focus on a given Key Process. Again, the higher the score, the more effective the leadership behaviors of the principal. For more details about the technical aspects of the VAL-ED scores and tips on interpreting scores, visit the VAL-ED website <https://valed.resonanteducation.com>.

Principal (P), Teacher (T), and Supervisor (S) Mean Effectiveness Ratings Across Key Processes			Mean Effectiveness	Teacher Rating Distribution
Total Effectiveness	P		3.07	
	T		3.57 (0.66)	
	S		3.51 (0.51)	
Planning	P		3.33	
	T		3.51 (0.59)	
	S		3.59 (0.44)	
Implementing	P		2.83	
	T		3.49 (0.72)	
	S		3.40 (0.52)	
Supporting	P		3.08	
	T		3.54 (0.66)	
	S		3.39 (0.70)	
Advocating	P		3.36	
	T		3.59 (0.78)	
	S		3.56 (0.56)	
Communicating	P		3.08	
	T		3.76 (0.69)	
	S		3.68 (0.35)	
Monitoring	P		2.75	
	T		3.63 (0.67)	
	S		3.26 (1.05)	
<p>1 Ineffective 2 Minimal 3 Satisfactory 4 High 5 Outstanding</p> <p>Effectiveness Rating</p>			<p>Numbers in () are standard deviations for teacher's ratings. (The larger the standard deviation, the greater the dispersion of teacher ratings.)</p>	<p>25% 50% 75% 100%</p> <p>Teacher Rating Distribution</p>

Using Results to Plan for Professional Growth

The matrix below provides an integrated summary of the principal's relative strengths and areas for growth based on the mean item scores for the intersection of Core Components by Key Processes across the three respondent groups.

- Cells that are green represent areas of behavior that are 'proficient' (3.60 - 3.99) or 'distinguished' (4.00 - 5.00).
- Cells that are yellow represent areas of behavior that are 'basic' (3.29 - 3.59).
- Cells that are red represent areas of behavior that are 'below basic' (1.00 - 3.28).

Core Components	Key Processes					
	Planning	Implementing	Supporting	Advocating	Communicating	Monitoring
High Standards for Student Learning	3.42	3.55	3.50	3.54	3.58	3.19
Rigorous Curriculum	3.39	2.90	3.53	3.79	3.26	3.39
Quality Instruction	3.53	3.45	3.81	3.81	3.21	2.95
Culture of Learning & Professional Behavior	3.57	3.70	3.56	3.71	3.88	3.59
Connections to External Communities	3.84	3.04	2.93	3.08	3.58	3.40
Performance Accountability	3.27	3.18	3.14	3.48	3.67	3.24

Leadership Behaviors for Possible Improvement

The leadership behaviors listed in each cluster on the following pages are representative of the lowest rated core component by key process areas of behavior. If fewer than six core component by key process areas of behavior are listed, that is because the principal had fewer than six that were below distinguished. If no behavior clusters are provided it indicates the principal's current learning-centered leadership behaviors are considered acceptable.

The behaviors on each page that are **boldface** type are those that were actually assessed in the evaluation. The other behaviors represent the entire pool of VAL-ED behaviors for each core component by key process. All of these behaviors are relevant targets for improvement.

For a list of all the leadership behaviors associated with each core component area, consult the VAL-ED Handbook.

Leadership Behaviors for Possible Improvement

Rigorous Curriculum X Implementing

- Coordinates a rigorous curriculum across grade levels.
- Hires teachers with the expertise to implement a rigorous curriculum.
- Coordinates teacher collaboration to implement a rigorous curriculum.
- Implements a rigorous curriculum in programs for students with special needs.
- **Implements a rigorous curriculum in all classes.**
- **Creates rigorous sequences of learning experiences/courses.**

Connections to External Communities X Supporting

- Motivates teachers to be responsive to all families.
- **Allocates resources that build family and community partnerships to advance student learning.**
- Secures resources to support school-community relationships.
- Secures technology from the district and/or the community to enhance teaching and learning.
- **Secures additional resources through partnering with external agencies to enhance teaching and learning.**
- Supports teachers to work with community agencies on behalf of students.

Quality Instruction X Monitoring

- Monitors the instruction of students at risk of failure to ensure high quality.
- Monitors the instruction of students with special needs to ensure high quality.
- **Evaluates teachers' instructional practices.**
- Uses data to monitor the quality of instruction.
- **Evaluates how instructional time is used.**
- Observes each teacher's instructional practices routinely to provide feedback.

Leadership Behaviors for Possible Improvement

Connections to External Communities X Implementing

- Implements programs to help parents assist their children to be successful in school.
- Coordinates access to social service agencies to support students.
- Builds a positive, open relationship with the community.
- **Implements programs to help address community needs.**
- Implements programs to involve families in the educational mission.
- **Builds business partnerships to support social and academic learning.**

Connections to External Communities X Advocating

- **Promotes mechanisms for reaching families who are least comfortable at school.**
- Advocates to district decision makers to promote the needs of all students.
- Challenges barriers from outside the school that can inhibit learning.
- **Challenges teachers to work with community agencies to support students with low achievement.**
- Advocates for students in need of special services with the external community.
- Advocates for social services needed by students and families.

Performance Accountability X Supporting

- Provides expertise to make decisions about holding students accountable for their learning.
- **Allocates time to evaluate student learning.**
- Provides expertise to evaluate faculty for student learning.
- **Allocates time to evaluate faculty for student learning.**
- Provides procedures that hold students accountable for their learning.
- Provides procedures to evaluate faculty for student learning.



About the VAL-ED

The Vanderbilt Assessment of Leadership in Education (VAL-ED) is conceptually and theoretically grounded and its resulting scores are reliable and valid for purposes of evaluating learning-centered leadership.

The VAL-ED uses 360 degree feedback from teachers, principals, and supervisors.

Content focuses on learning-centered leadership behaviors that influence teachers and staff, and in turn are related to increases in student achievement.

Assessment is of leadership behaviors, not knowledge, dispositions, or personal characteristics of leadership.

The VAL-ED requires respondents to identify evidence on which they are basing their assessment of principal behaviors.

The psychometric properties of the VAL-ED are clearly documented. Information on norms, standards, and uses is available through a comprehensive technical manual.

"Leadership is a central ingredient - often the keystone element in school and district success as defined in terms of student achievement."

- Joseph Murphy
Vanderbilt University

"Assessments that provide ongoing performance feedback to school leaders about their learning-centered leadership behaviors can substantially help school leaders develop effective leadership for school improvement."

- Ellen Goldring
Vanderbilt University

Visit

<https://valed.resonanteducation.com>

For more information and periodic updates on research and related articles on the use of VAL-ED

VAL-ED Authors

Andrew Porter, Joseph Murphy,
Ellen Goldring, & Stephen N. Elliott

End-of-Cycle Summative Evaluation Report: Head of School

Head of School: _____

Evaluator: _____

Name

Signature

Date

Step 1: Assess Progress Toward Goals (Complete page 3 first; circle one for each set of goal[s].)

Professional Practice Goal(s)	Did Not Meet	Some Progress	Significant Progress	Met	Exceeded
Student Learning Goal(s)	Did Not Meet	Some Progress	Significant Progress	Met	Exceeded
School Improvement Goal(s)	Did Not Meet	Some Progress	Significant Progress	Met	Exceeded

Step 2: Assess Performance on Standards (Complete pages 4–7 first; then check one box for each standard.)

Indicators

Unsatisfactory = Performance on a standard or overall has not significantly improved following a rating of *Needs Improvement*, or performance is consistently below the requirements of a standard or overall and is considered inadequate, or both.

Needs Improvement/Developing = Performance on a standard or overall is below the requirements of a standard or overall but is not considered to be Unsatisfactory at the time. Improvement is necessary and expected. For new Heads of School, performance is on track to achieve proficiency within three years.

Proficient = Proficient practice is understood to be fully satisfactory. This is the rigorous expected level of performance.

Exemplary = A rating of Exemplary indicates that practice significantly exceeds Proficient and could serve as a model of practice regionally or statewide.

	Unsatisfactory	Needs Improvement	Proficient	Exemplary
Standard I: Instructional Leadership	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Standard II: Management and Operations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Standard III: Family and Community Engagement	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Standard IV: Professional Culture	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

End-of-Cycle Summative Evaluation Report: Head of School

Step 3: Rate Overall Summative Performance (*Based on Step 1 and Step 2 ratings; circle one.*)

Unsatisfactory

Needs Improvement

Proficient

Exemplary

Step 4: Add Evaluator Comments

Comments and analysis are required in support of any rating other than Proficient.

Comments:

Name: _____ Date: _____

Head of School Performance Goals

Goals should be SMART and include at least one goal for each category: professional practice, student learning, and school improvement.
 Check one box for each goal.

Goal(s)	Description	Did Not Meet	Some Progress	Significant Progress	Met	Exceeded
Professional Practice						
1	<p>Effective Entry and Direction Setting. By early spring, the school will have broad agreement from key stakeholder groups about (a) the school's most critical needs, (b) the strategies and goals that will address them most effectively, and (c) the measures that will be used to assess progress.</p> <p>Standard – I-E, II-A, III-A, III-C, IV-4, IV-E</p>	☒	☒	☒	☒	☒
School Improvement						
2	<p>Maintain Momentum During the Transition. Keep the school moving forward during this year's transition in leadership by working with the Admin Team and other school leaders to ensure that meaningful progress is made on critical school goals</p> <p>Standard - I-A, III-D, IV-C</p>	☒	☒	☒	☒	☒
Professional Practice						
3	<p>New Charter Public School Leader Program - MCPSA. Develop knowledge of the role of Head of School and skills in team building, community support, budgeting, development, and instructional leadership by completing the first year of the New Leader Program led by the Massachusetts Charter Public School Association.</p> <p>Standard – II-D, II-E</p>	☒	☒	☒	☒	☒
Student Improvement						
4	<p>Begin the Process of designing an effective plan for Instructional Coaching and Teacher Evaluation. (This is year one of a multi-year goal.) Work with evaluators toward developing a coaching model that leads to improved instructional practices across the school</p> <p>Standard – I-B, I-C, I-D, IV-D</p>	☒	☒	☒	☒	☒
Permanent						
Standard II-D	<p>Law, Ethics, and Policies: Understands and complies with state and federal laws and mandates, Board policies, and ethical process lines.</p>	☒	☒	☒	☒	☒

Standard II-E	Fiscal Systems: Develops a budget that supports the school's vision, mission, and goals; allocates and manages expenditures consistent with school goals and available resources.	✉	✉	✉	✉	✉
Standard IV-E	Shared Vision: Successfully and continuously engages all stakeholders in the creation of a shared educational vision in which every student is prepared to succeed in postsecondary education and become a responsible citizen and global contributor.	✉	✉	✉	✉	✉

Comments:

Head of School Performance Rating for Standard I: Instructional Leadership

	Unsatisfactory	Needs Improvement	Proficient	Exemplary
I-A. Curriculum: Ensures that all instructional staff design effective and rigorous standards-based units of instruction consisting of well-structured lessons with measureable outcomes. Goal #2	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
I-B. Instruction: Ensures that practices in all settings reflect high expectations regarding content and quality of effort and work, engage all students, and are personalized to accommodate diverse learning styles, needs, interests, and levels of readiness. Goal #4	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
I-C. Assessment: Ensures that all Heads of School and administrators facilitate practices that propel personnel to use a variety of formal and informal methods and assessments to measure student learning, growth, and understanding and make necessary adjustments to their practice when students are not learning. Goal #4	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
I-D. Evaluation: Ensures effective and timely supervision and evaluation of all staff in alignment with state regulations and contract provisions. Goal #4	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
I-E. Data-Informed Decision Making: Uses multiple sources of evidence related to student learning—including state and school assessment results and growth data—to inform school goals and improve organizational performance, educator effectiveness, and student learning. Goal #1	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Overall Rating for Standard I (Circle one.)	The education leader promotes the learning and growth of all students and the success of all staff by cultivating a shared vision that makes powerful teaching and learning the central focus of schooling.
--	---

Unsatisfactory

Needs Improvement

Proficient

Exemplary

Comments and analysis (required for all ratings other than Proficient):

Examples of evidence Head of School might provide:

- | | | |
|--|---|---|
| <input type="checkbox"/> Goals progress report | <input type="checkbox"/> Analysis of staff evaluation data | <input type="checkbox"/> Relevant Board meeting agendas/materials |
| <input type="checkbox"/> Analysis of classroom walk-through data | <input type="checkbox"/> Report on educator practice and student learning goals | <input type="checkbox"/> Analysis of leadership team(s) agendas and/or feedback |
| <input type="checkbox"/> Analysis of school assessment data | <input type="checkbox"/> Student achievement data | <input type="checkbox"/> Protocol for school visits |
| <input type="checkbox"/> Sample of school improvement plans and progress reports | <input type="checkbox"/> Analysis of student feedback | <input type="checkbox"/> Other: _____ |
| | <input type="checkbox"/> Analysis of staff feedback | |

Head of School Performance Rating for Standard II: Management and Operations

	Unsatisfactory	Needs Improvement	Proficient	Exemplary
II-A. Environment: Develops and executes effective plans, procedures, routines, and operational systems to address a full range of safety, health, emotional, and social needs. Goal #1	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
II-B. Human Resources Management and Development: Implements a cohesive approach to recruiting, hiring, induction, development, and career growth that promotes high-quality and effective practice. Other Evidence	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
II-C. Scheduling and Management Information Systems: Uses systems to ensure optimal use of data and time for teaching, learning, and collaboration, minimizing disruptions and distractions for school-level staff.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
II-D. Law, Ethics, and Policies: Understands and complies with state and federal laws and mandates, Board policies, and ethical process lines. Permanent Goal, Goal #3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
II-E. Fiscal Systems: Develops a budget that supports the school's vision, mission, and goals; allocates and manages expenditures consistent with school goals and available resources. Permanent Goal, Goal #3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Overall Rating for Standard II (Circle one.)	The education leader promotes the learning and growth of all students and the success of all staff by ensuring a safe, efficient, and effective learning environment, using resources to implement appropriate curriculum, staffing, and scheduling.
---	--

Unsatisfactory

Needs Improvement

Proficient

Exemplary

Comments and analysis (required for all ratings other than Proficient):

Examples of evidence Head of School might provide:

- | | | |
|---|---|---|
| <input type="checkbox"/> Goals progress report | <input type="checkbox"/> Analysis of student feedback | <input type="checkbox"/> Analysis and/or samples of leadership team(s) schedule/agendas/materials |
| <input type="checkbox"/> Budget analyses and monitoring reports | <input type="checkbox"/> Analysis of staff feedback | <input type="checkbox"/> Other: _____ |
| <input type="checkbox"/> Budget presentations and related materials | <input type="checkbox"/> Analysis of safety and crisis plan elements and/or incidence reports | |
| <input type="checkbox"/> External reviews and audits | <input type="checkbox"/> Relevant Board meeting agendas/minutes/materials | |
| <input type="checkbox"/> Staff attendance, hiring, retention, and other HR data | | |

Head of School Performance Rating for Standard III: Family and Community Engagement

	Unsatisfactory	Needs Improvement	Proficient	Exemplary
<i>Check one box for each indicator and circle the overall standard rating.</i>				
III-A. Engagement: Actively ensures that all families are welcome members of the classroom and school community and can contribute to the effectiveness of the classroom, school, and community. Goal #1	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
III-B. Sharing Responsibility: Continuously collaborates with families and community stakeholders to support student learning and development at home, school, and in the community. Other Evidence	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
III-C. Communication: Engages in regular, two-way, culturally proficient communication with families and community stakeholders about student learning and performance. Goal #1	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
III-D. Family Concerns: Addresses family and community concerns in an equitable, effective, and efficient manner. Goal #2	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Overall Rating for Standard III (Circle one.)	The education leader promotes the learning and growth of all students and the success of all staff through effective partnerships with families, community organizations, and other stakeholders that support the mission of the school.
--	--

Unsatisfactory

Needs Improvement

Proficient

Exemplary

Comments and analysis (required for all ratings other than Proficient):

Examples of evidence Head of School might provide:

- | | | |
|---|---|---|
| <ul style="list-style-type: none"> <input type="checkbox"/> Goals progress report <input type="checkbox"/> Participation rates and other data about school family engagement activities <input type="checkbox"/> Evidence of community support and/or engagement | <ul style="list-style-type: none"> <input type="checkbox"/> Sample school newsletters and/or other communications <input type="checkbox"/> Analysis of school improvement goals/reports <input type="checkbox"/> Community organization membership/participation/contributions | <ul style="list-style-type: none"> <input type="checkbox"/> Analysis of survey results from parent and/or community stakeholders <input type="checkbox"/> Relevant Board presentations and minutes <input type="checkbox"/> Other: _____ |
|---|---|---|

Head of School Performance Rating for Standard IV: Professional Culture

Check one box for each indicator and circle the overall standard rating.

	Unsatisfactory	Needs Improvement	Proficient	Exemplary
IV-A. Commitment to High Standards: Fosters a shared commitment to high standards of service, teaching, and learning with high expectations for achievement for all. Goal #1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
IV-B. Cultural Proficiency: Ensures that policies and practices enable staff members and students to interact effectively in a culturally diverse environment in which students' backgrounds, identities, strengths, and challenges are respected.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
IV-C. Communication: Demonstrates strong interpersonal, written, and verbal communication skills. Goal #2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
IV-D. Continuous Learning: Develops and nurtures a culture in which staff members are reflective about their practice and use student data, current research, best practices, and theory to continuously adapt practice and achieve improved results. Models these behaviors in his or her own practice. Goal #4	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
IV-E. Shared Vision: Successfully and continuously engages all stakeholders in the creation of a shared educational vision in which every student is prepared to succeed in postsecondary education and become a responsible citizen and global contributor. Permanent Goal, Goal #1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
IV-F. Managing Conflict: Employs strategies for responding to disagreement and dissent, constructively resolving conflict and building consensus throughout school community. Other Evidence	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Overall Rating for Standard IV (Circle one .)	The education leader promotes the learning and growth of all students and the success of all staff by nurturing and sustaining a schoolwide culture of reflective practice, high expectations, and continuous learning for staff.
---	---

Unsatisfactory

Needs Improvement

Proficient

Exemplary

Comments and analysis (required for overall ratings other than Proficient)

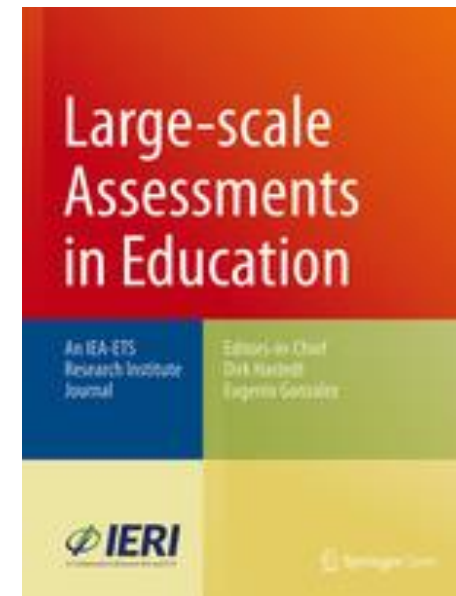
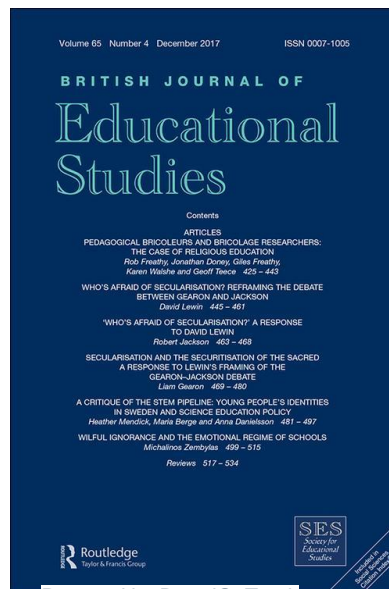
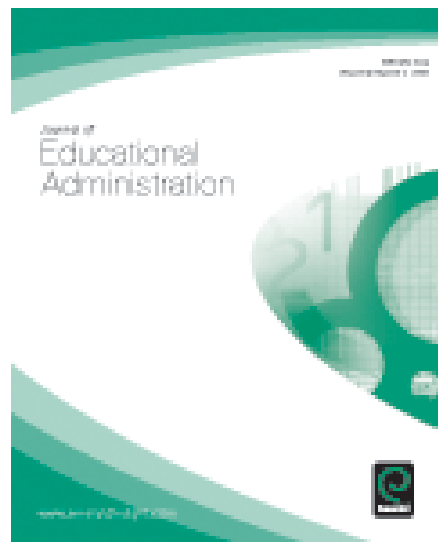
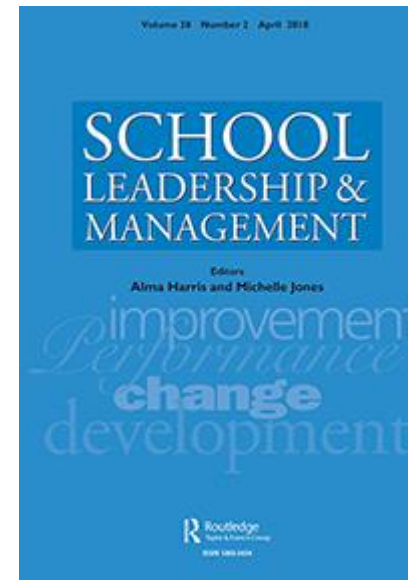
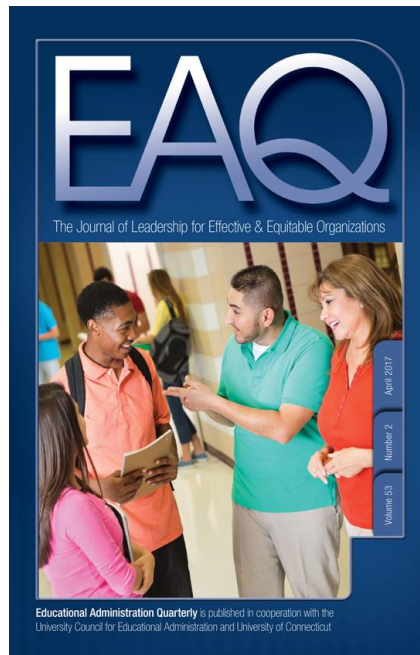
Examples of evidence Head of School might provide:

- | | | |
|--|---|---|
| <input type="checkbox"/> Goals progress report | <input type="checkbox"/> School visit protocol and sample follow-up reports | <input type="checkbox"/> Board meeting agendas/materials |
| <input type="checkbox"/> School improvement plans and reports | <input type="checkbox"/> Presentations/materials for community/parent meetings | <input type="checkbox"/> Sample of leadership team(s) agendas and materials |
| <input type="checkbox"/> Staff attendance and other data | <input type="checkbox"/> Analysis of staff feedback | <input type="checkbox"/> Analysis of staff feedback |
| <input type="checkbox"/> Memos/newsletters to staff and other stakeholders | <input type="checkbox"/> Samples of Head of School/administrator practice goals | <input type="checkbox"/> Other: _____ |

2020 Personnel Committee

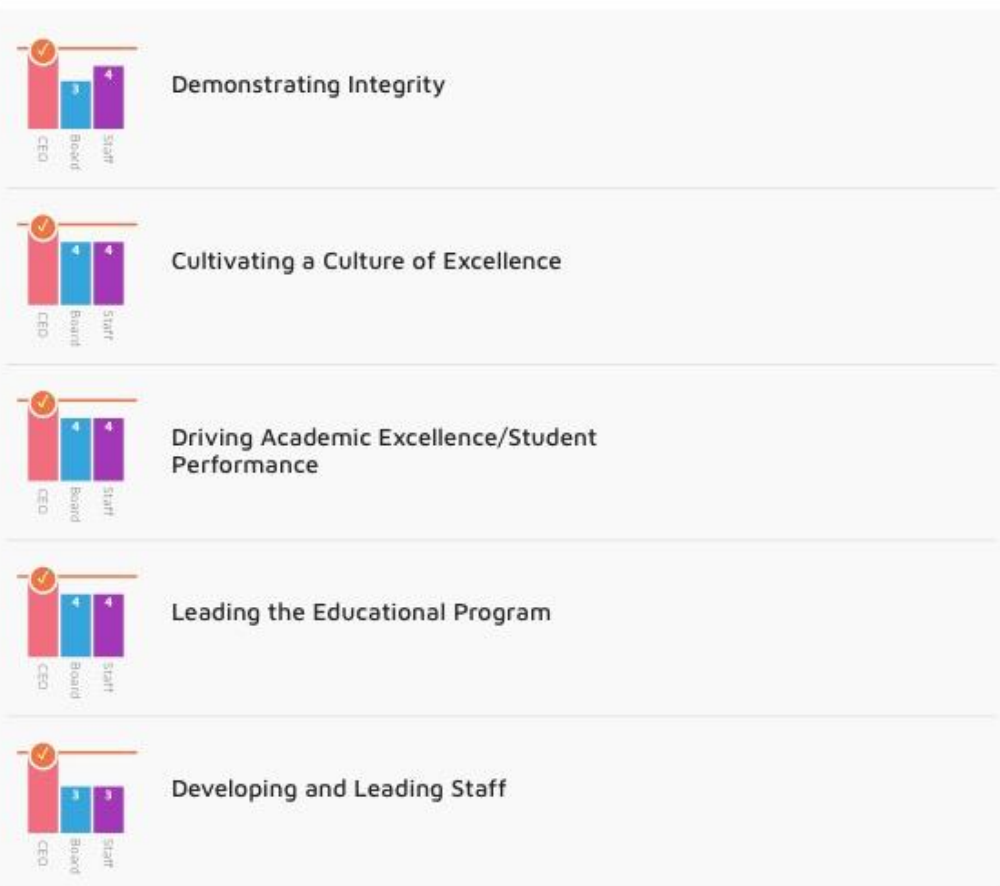
Surveys

Board on Track (CEO Evaluation)
Val-Ed (Leadership in Education)



Board on Track Survey

Summary



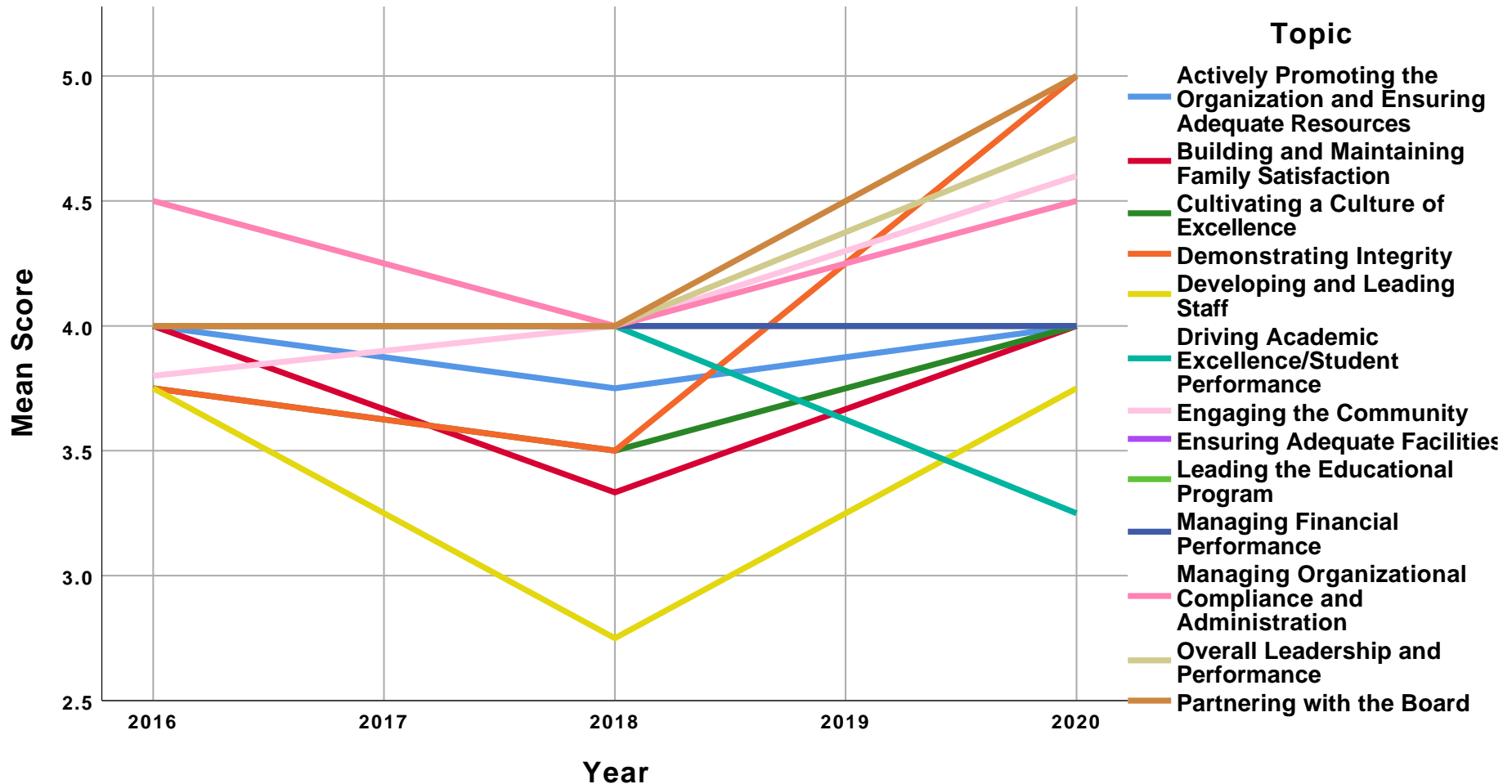
BOT survey

Year	Board		Staff	
	%	Score	%	Score
2016		3.96		3.36
2018		3.76		3.73
2020	75	4.25	75	3.68

BOT: Board by topic

Multiple Line Mean of Score by Year by Topic

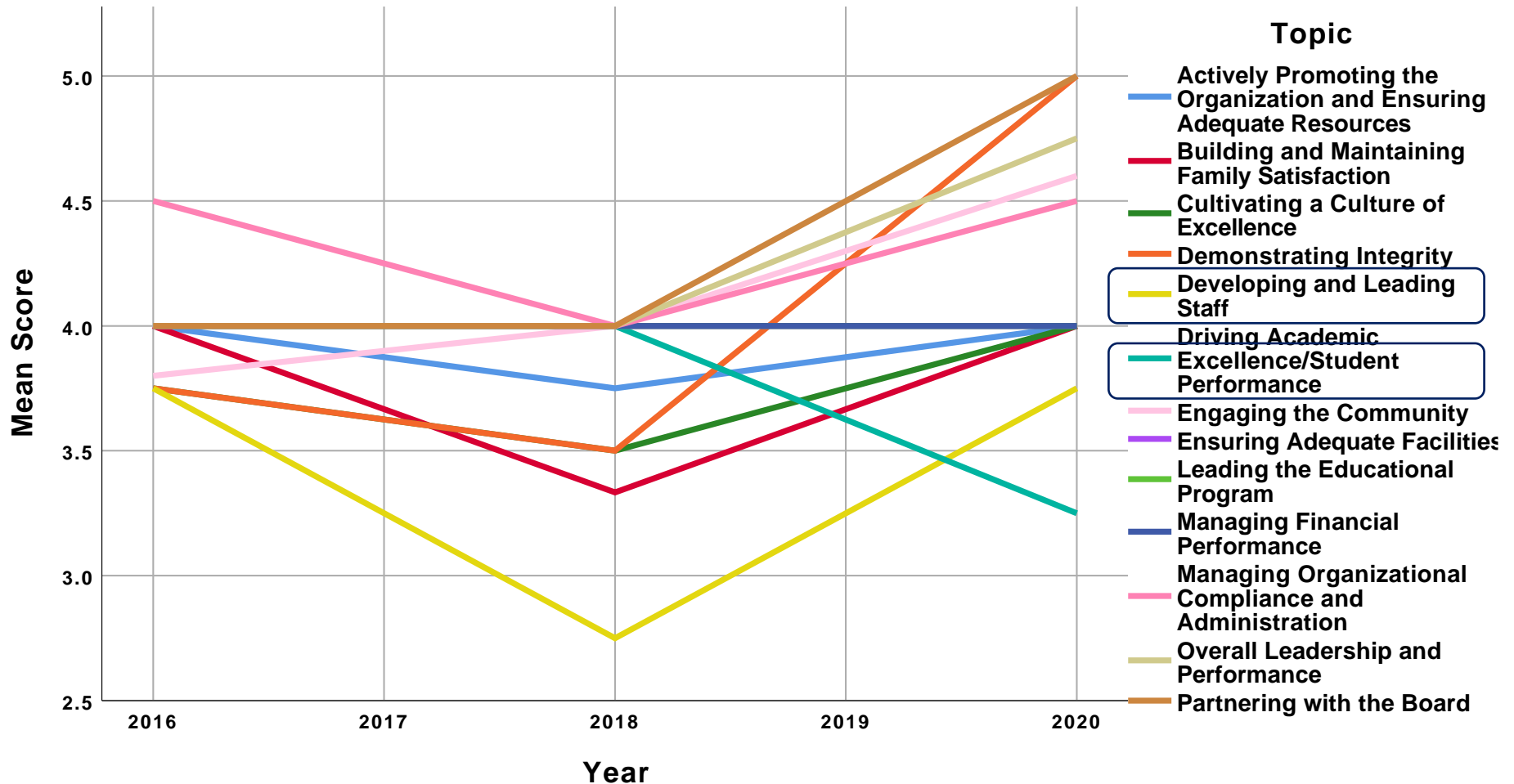
Respondent: Board



BOT: Board by topic

Multiple Line Mean of Score by Year by Topic

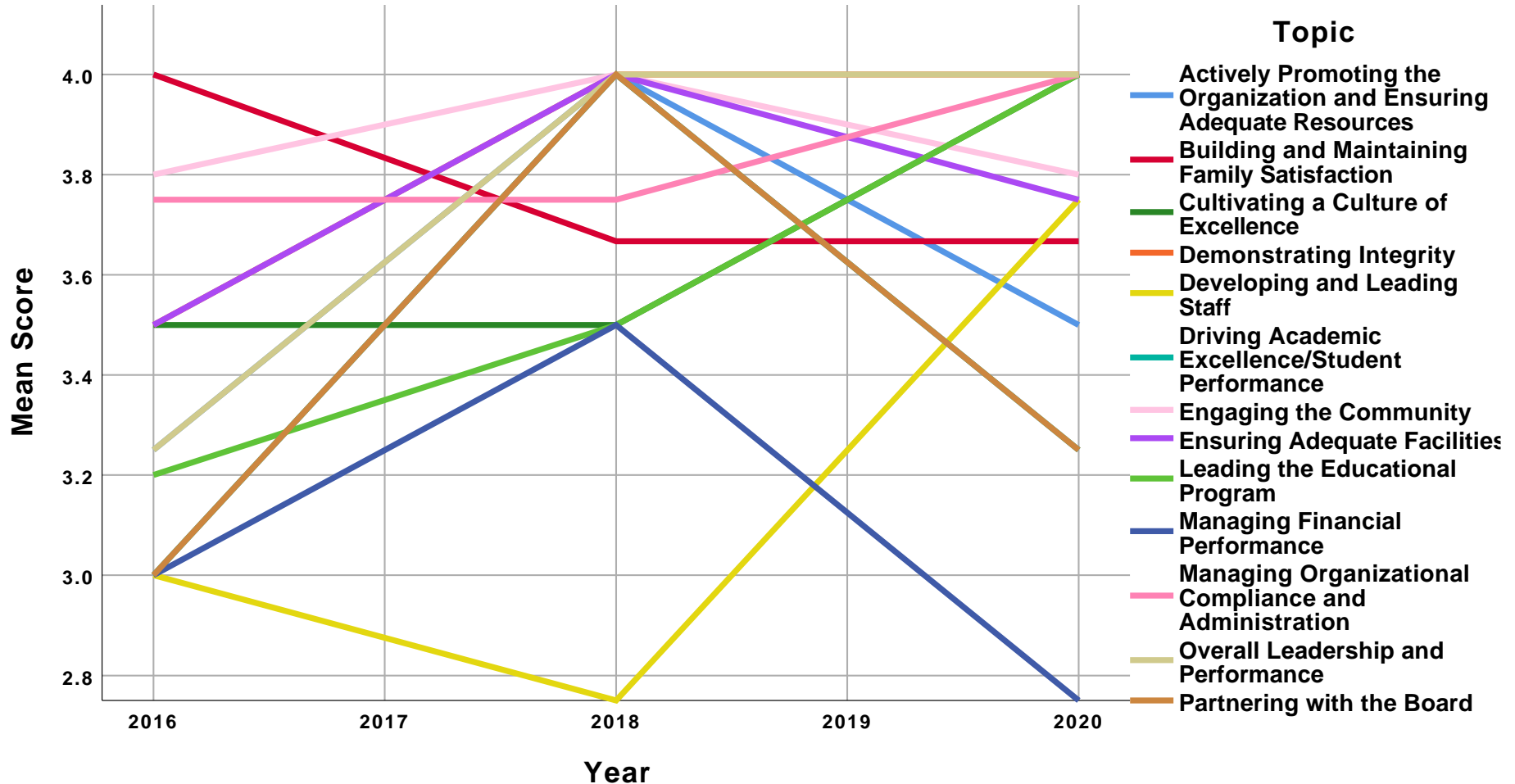
Respondent: Board



BOT: Staff by topic

Multiple Line Mean of Score by Year by Topic

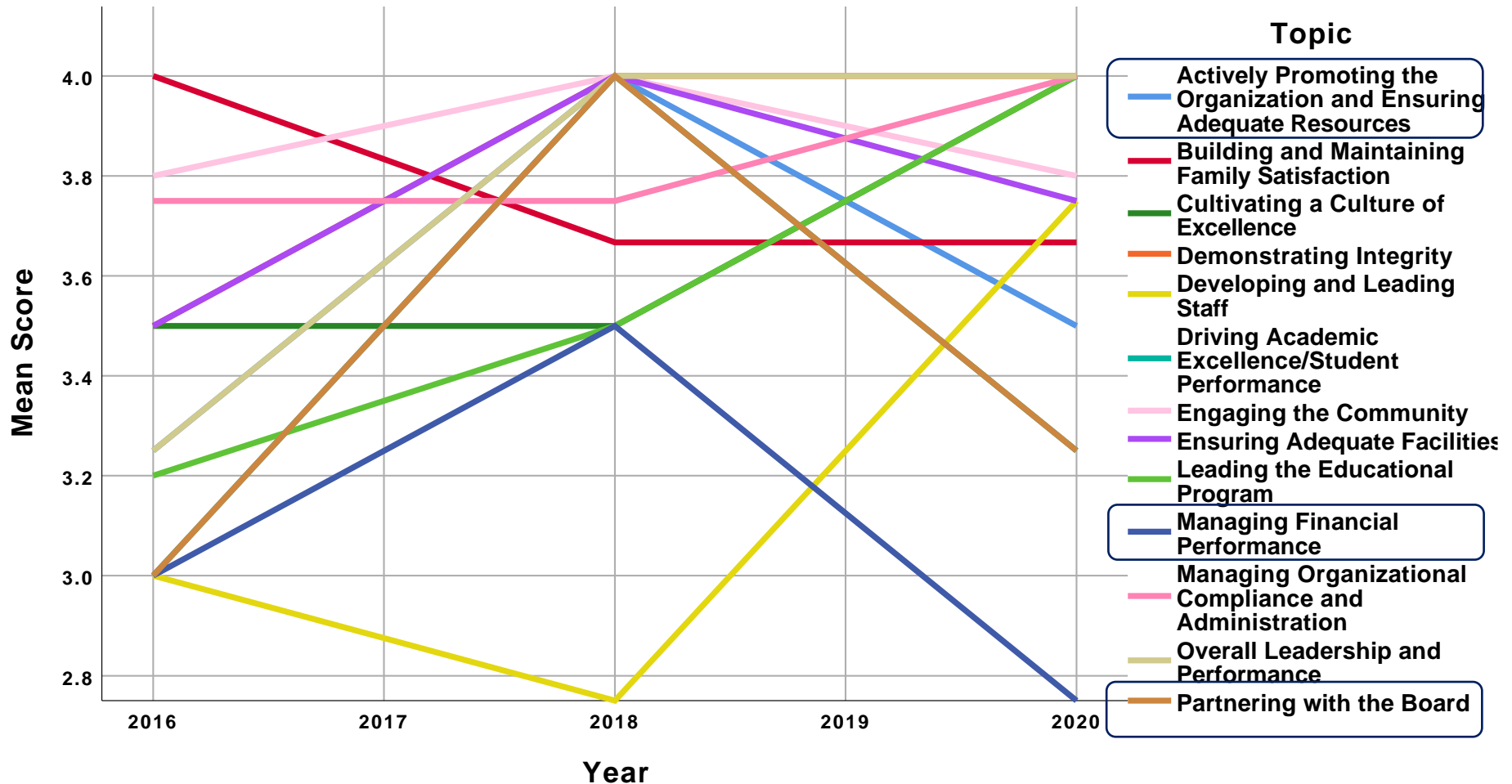
Respondent: Staff



BOT: Staff by topic

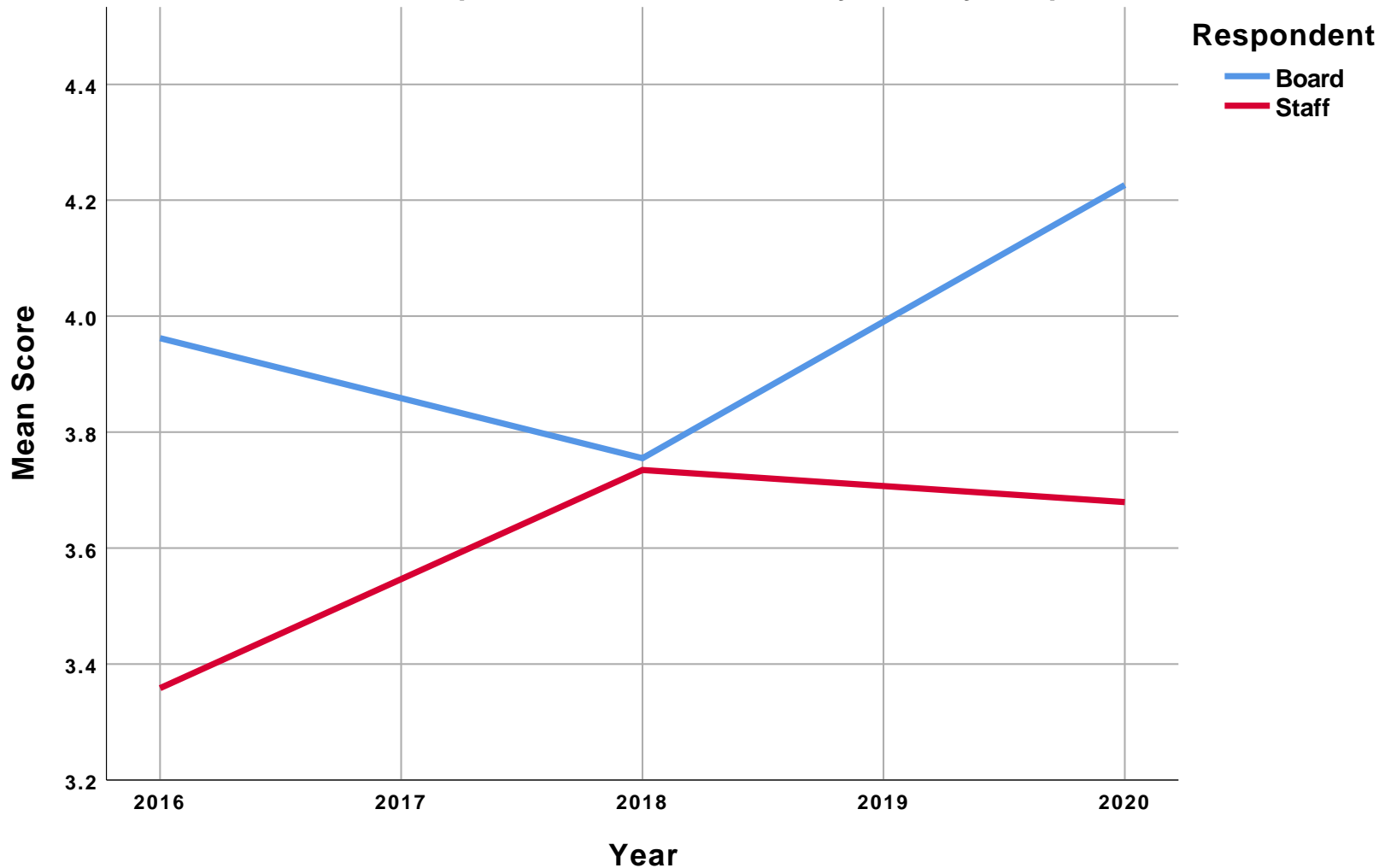
Multiple Line Mean of Score by Year by Topic

Respondent: Staff



BOT: Staff & Board

Multiple Line Mean of Score by Year by Respondent





VANDERBILT ASSESSMENT of LEADERSHIP in EDUCATION

SURVEY FOR: ANTONIETTA SIMONIS at SUNT QUIDEM VOLUPTATIBUS ILLO

High Standards for Student Learning (0/6)



1 of 7

High Standards for Student Learning (0/6)

36 Questions Remaining

High Standards for Student Learning

Completed: 0 of 6

Sources of Evidence

Check Key Sources of Evidence

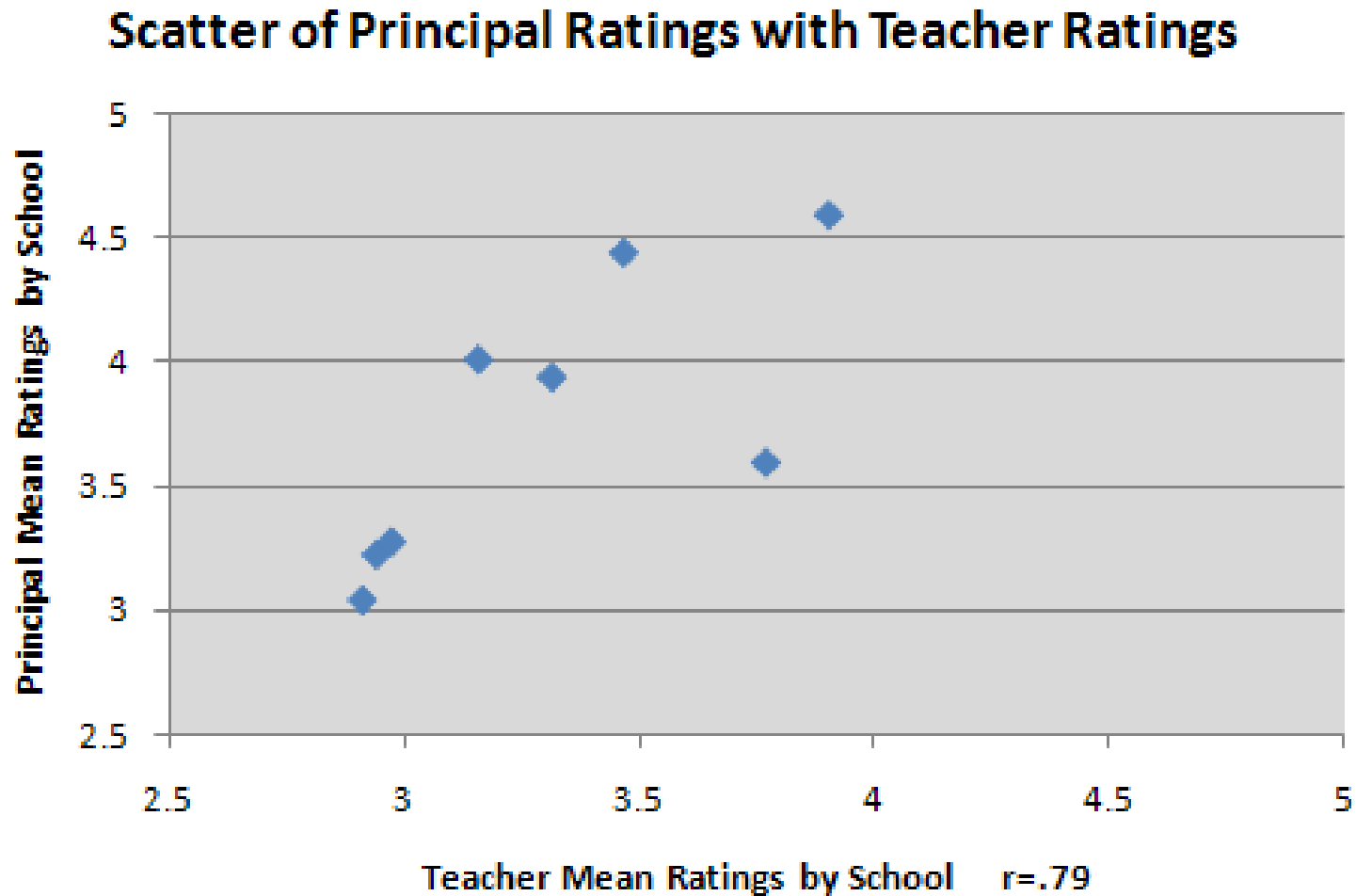
Effectiveness Rating

Choose one to indicate level of effectiveness or check 'Don't Know'

How effective is the principal at ensuring the school...

		Reports From Others	Personal Observation	School Documents	School Projects or Activities	Other Sources	No Evidence	Ineffective	Minimally Effective	Satisfactorily Effective	Highly Effective	Outstandingly Effective	Don't Know
Planning	plans targets of faculty performance that emphasize improvement in student learning.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
								1	2	3	4	5	
Implementing	creates expectations that faculty maintain high standards for student learning.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
								1	2	3	4	5	
Supporting	encourages students to successfully achieve rigorous goals for student learning.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
								1	2	3	4	5	
Evaluating	challenges low expectations for special needs students.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
								1	2	3	4	5	

For Val-Ed HOS and teachers - mean effectiveness score



- From the Val-Ed handbook

Response Rate

	Possible Respondents	Actual Respondents	Percent (%) Responding
Principal	1	1	100%
Teachers	47	31	66%
Supervisor	13	7	54%

			Mean Effectiveness	Teacher Rating Distribution
Total Effectiveness	P		3.07	
	T		3.57 (0.66)	
	S		3.51 (0.51)	
High Standards for Student Learning	P		3.08	
	T		3.60 (0.73)	
	S		3.75 (0.35)	
Rigorous Curriculum	P		3.00	
	T		3.52 (0.70)	
	S		3.51 (0.45)	
Quality Instruction	P		3.27	
	T		3.63 (0.68)	
	S		3.29 (0.83)	
Culture of Learning & Professional Behavior	P		3.33	
	T		3.80 (0.54)	
	S		3.84 (0.37)	
Connections to External Communities	P		2.83	
	T		3.58 (0.72)	
	S		3.43 (0.53)	
Performance Accountability	P		2.92	
	T		3.57 (0.72)	
	S		3.50 (0.39)	

1 Ineffective | 2 Minimal | 3 Satisfactory | 4 High | 5 Outstanding

Effectiveness Rating

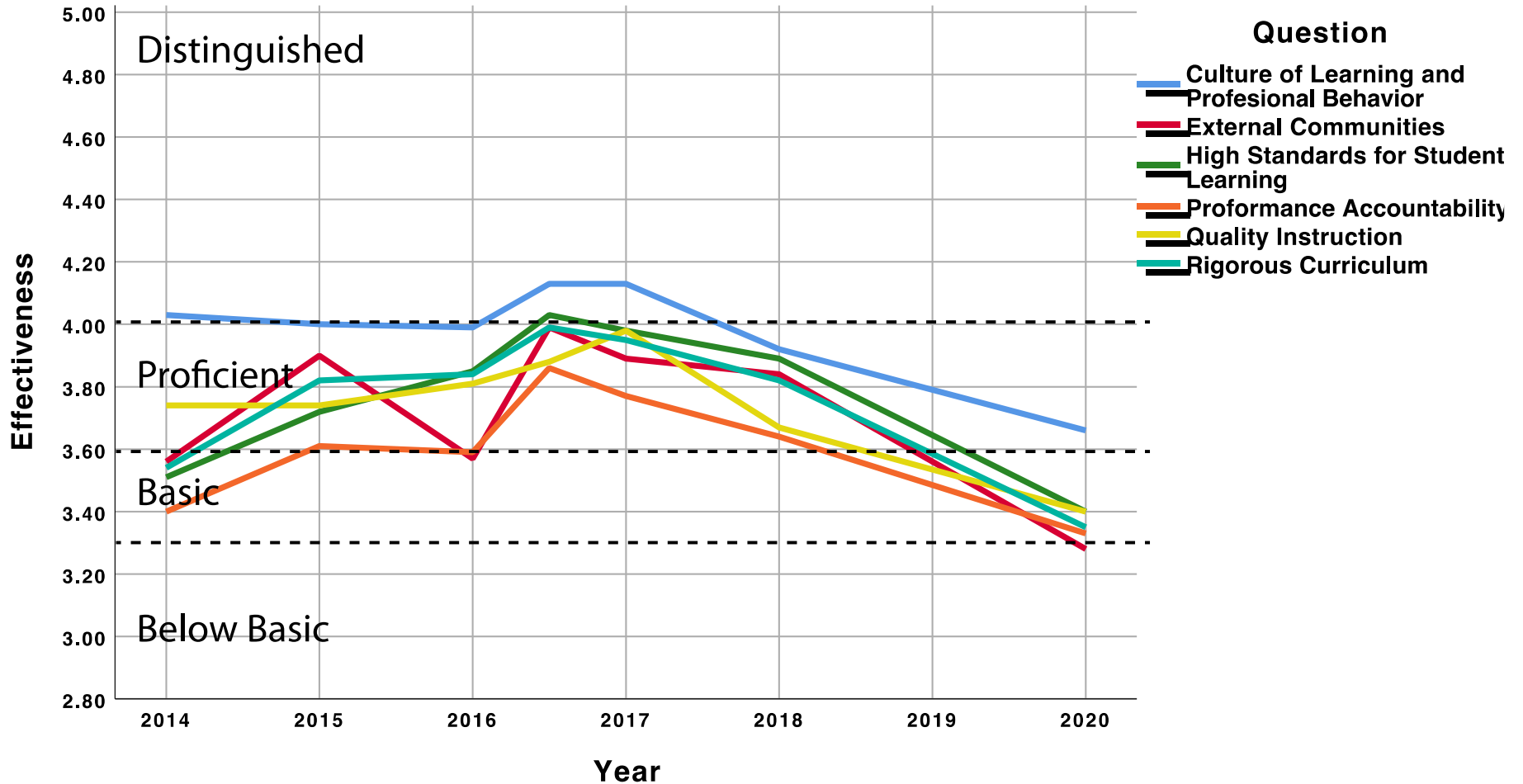
Numbers in () are standard deviations for teacher's ratings. (The larger the standard deviation, the greater the dispersion of teacher ratings.)

25% | 50% | 75% | 100%

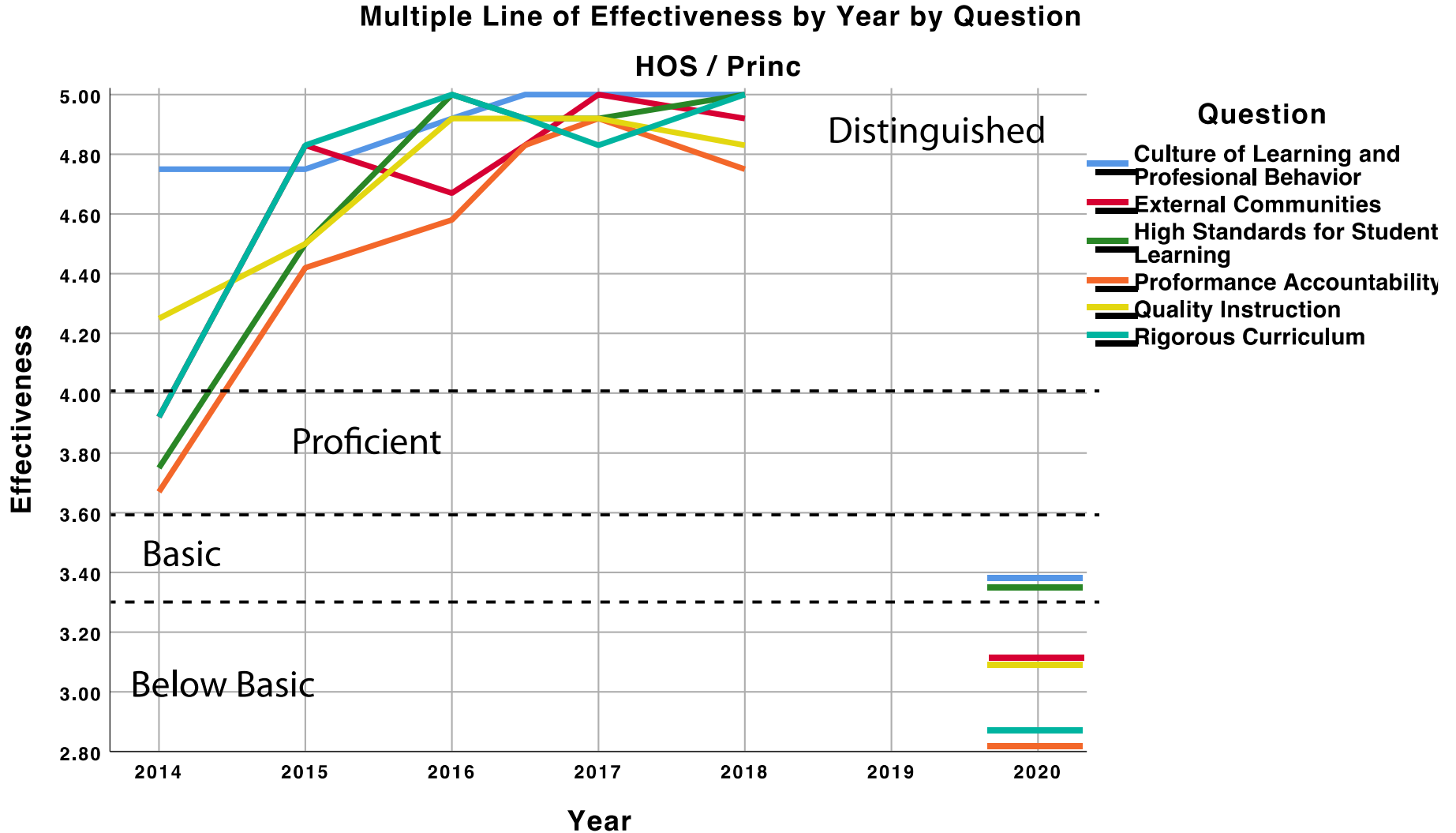
Teacher Rating Distribution

Total by Question

Multiple Line of Effectiveness by Year by Question
Total (all three groups)

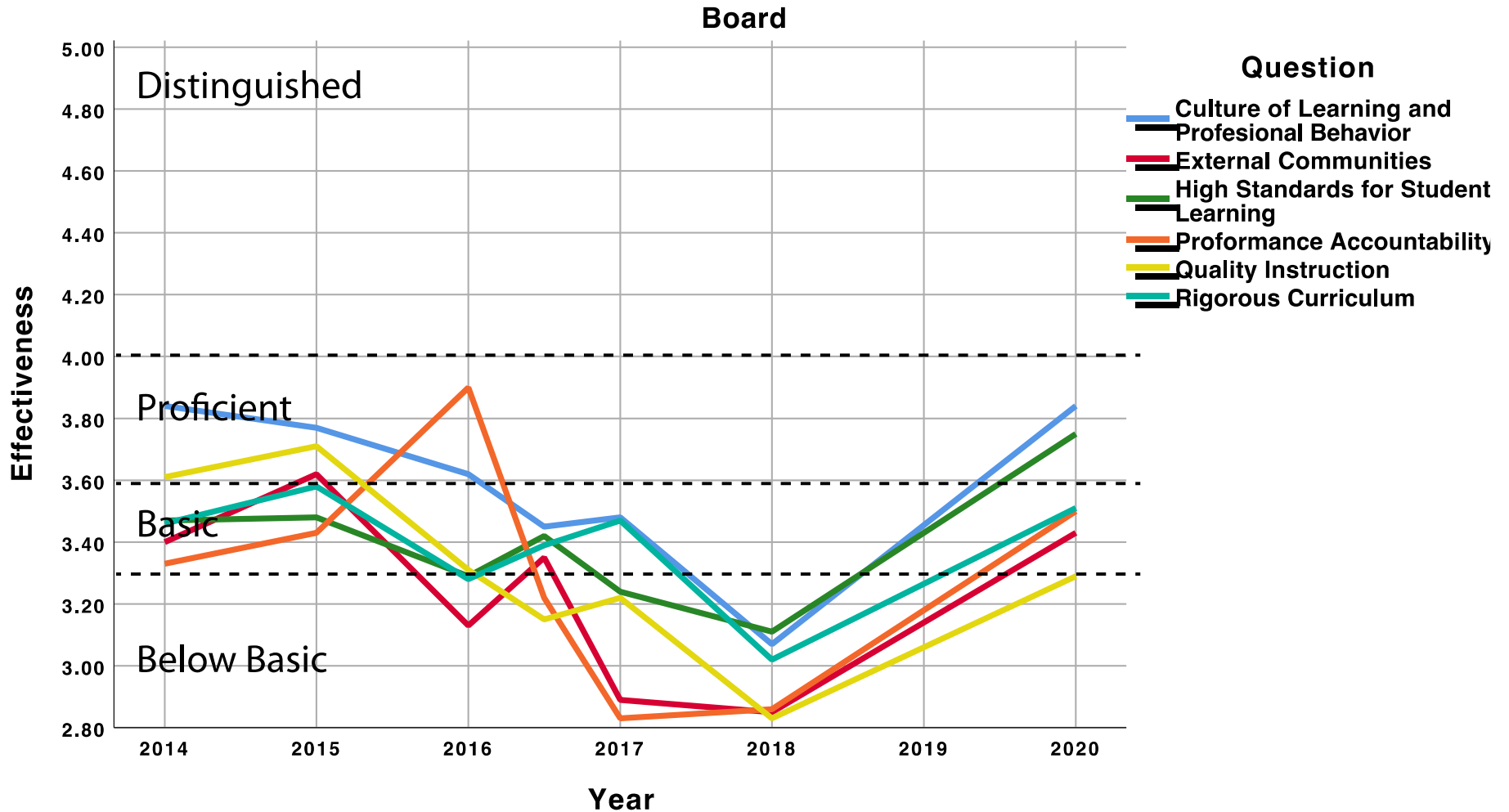


HOS by Question



Board by Question

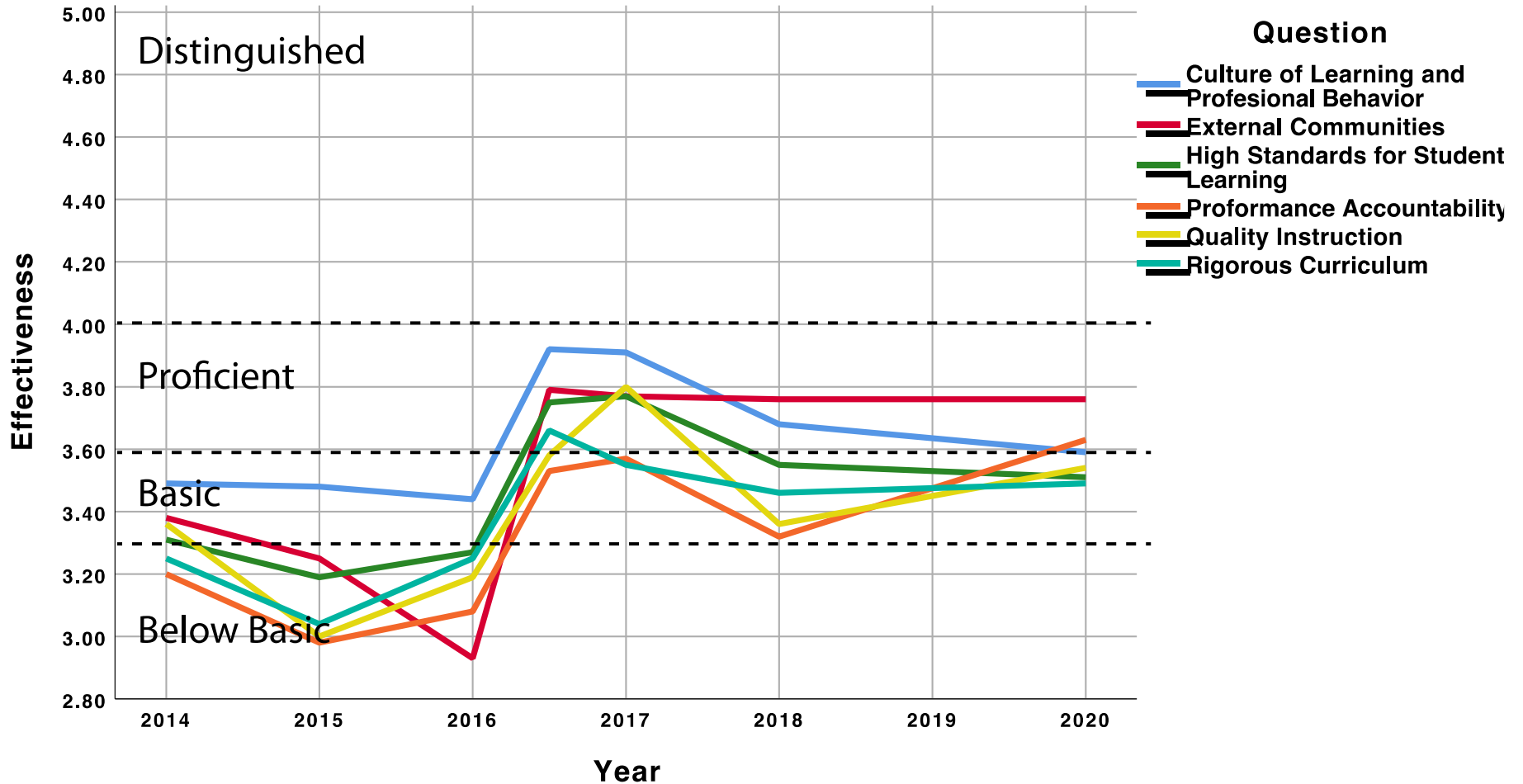
Multiple Line of Effectiveness by Year by Question



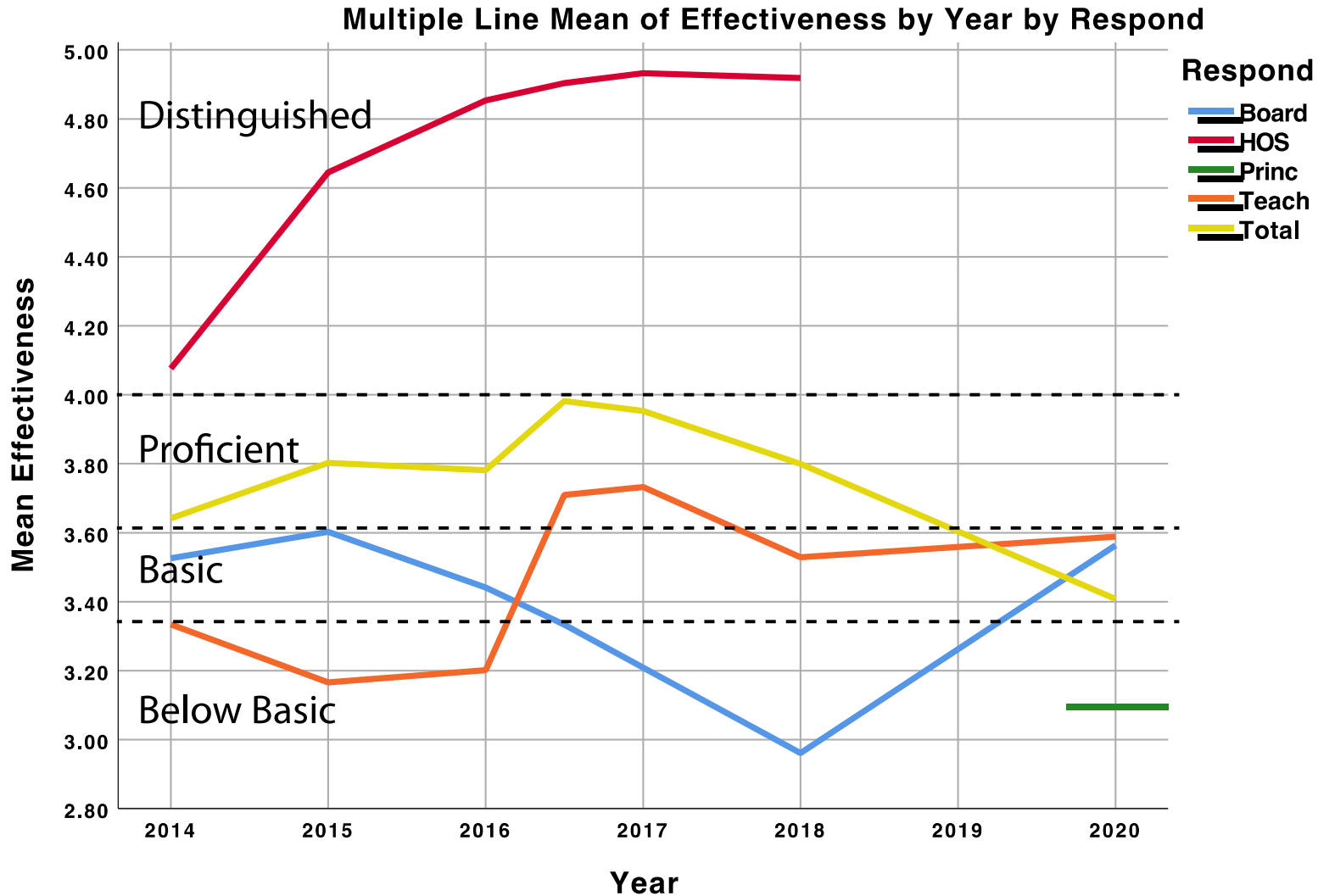
Staff by Question

Multiple Line of Effectiveness by Year by Question

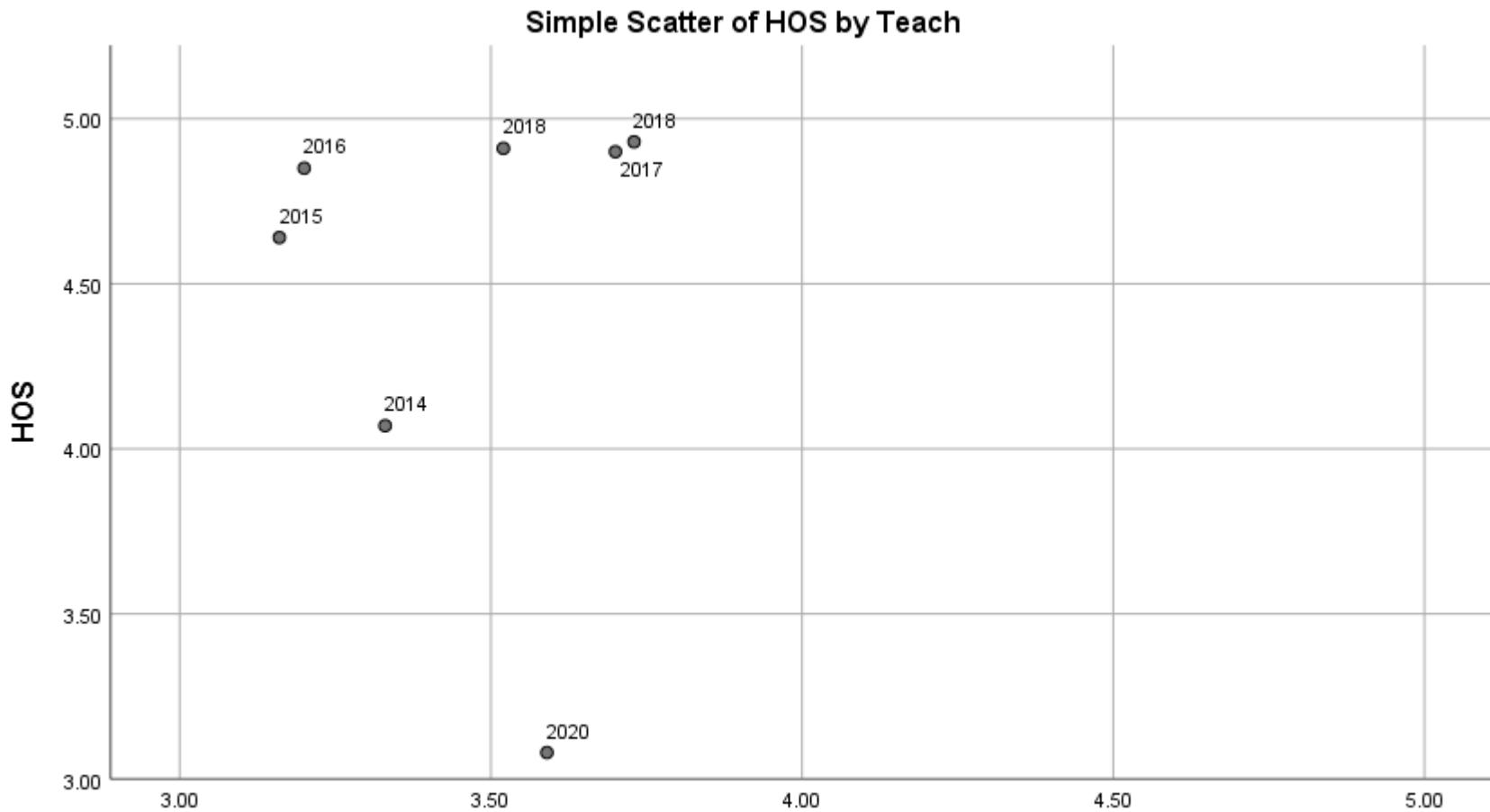
Staff



Respondent over time



HOS and Teachers – mean effectiveness score



- Cells that are green represent areas of behavior that are 'proficient' (3.60 - 3.99) or 'distinguished' (4.00 - 5.00).
- Cells that are yellow represent areas of behavior that are 'basic' (3.29 - 3.59).
- Cells that are red represent areas of behavior that are 'below basic' (1.00 - 3.28).

Core Components	Key Processes					
	Planning	Implementing	Supporting	Advocating	Communicating	Monitoring
High Standards for Student Learning	3.42	3.55	3.50	3.54	3.58	3.19
Rigorous Curriculum	3.39	2.90	3.53	3.79	3.26	3.39
Quality Instruction	3.53	3.45	3.81	3.81	3.21	2.95
Culture of Learning & Professional Behavior	3.57	3.70	3.56	3.71	3.88	3.59
Connections to External Communities	3.84	3.04	2.93	3.08	3.58	3.40
Performance Accountability	3.27	3.18	3.14	3.48	3.67	3.24

- Cells that are green represent areas of behavior that are 'proficient' (3.60 - 3.99) or 'distinguished' (4.00 - 5.00).
- Cells that are yellow represent areas of behavior that are 'basic' (3.29 - 3.59).
- Cells that are red represent areas of behavior that are 'below basic' (1.00 - 3.28).

Core Components	Key Processes					
	Planning	Implementing	Supporting	Advocating	Communicating	Monitoring
High Standards for Student Learning	3.42	3.55	3.50	3.54	3.58	3.19
Rigorous Curriculum	3.39	2.90	3.53	3.79	3.26	3.39
Quality Instruction	3.53	3.45	3.81	3.81	3.21	2.95
Culture of Learning & Professional Behavior	3.57	3.70	3.56	3.71	3.88	3.59
Connections to External Communities	3.84	3.04	2.93	3.08	3.58	3.40
Performance Accountability	3.27	3.18	3.14	3.48	3.67	3.24

- Cells that are green represent areas of behavior that are 'proficient' (3.60 - 3.99) or 'distinguished' (4.00 - 5.00).
- Cells that are yellow represent areas of behavior that are 'basic' (3.29 - 3.59).
- Cells that are red represent areas of behavior that are 'below basic' (1.00 - 3.28).

Core Components	Key Processes					
	Planning	Implementing	Supporting	Advocating	Communicating	Monitoring
High Standards for Student Learning	3.42	3.55	3.50	3.54	3.58	3.19
Rigorous Curriculum	3.39	2.90	3.53	3.79	3.26	3.39
Quality Instruction	3.53	3.45	3.81	3.81	3.21	2.95
Culture of Learning & Professional Behavior	3.57	3.70	3.56	3.71	3.88	3.59
Connections to External Communities	3.84	3.04	2.93	3.08	3.58	3.40
Performance Accountability	3.27	3.18	3.14	3.48	3.67	3.24

Cover Sheet

Finance Committee

Section: VII. Committee Updates
Item: B. Finance Committee
Purpose: Discuss
Submitted by:
Related Material: FY21 Budget - PROPOSED, 4-20-2020.pdf
Financial Reports, Mar-20.pdf

**MCCPS
FY21 Operating Budget worksheet**

	FY20 Approved	6 mos actual
Ordinary Income/Expense		
Income		
4057 — VACATION PROGRAMMING	7,250	7,250
4005 — STATE ALLOCATION	3,072,227	1,678,877
Total 4040 — INVESTMENT INCOME	100	56
4050 — OTHER INCOME		
4051 — 17 Lime Rent	20,844	8,926
4054 — Misc. Inc.	200	10,776
4056 — Homework Club	10,000	1,039
4050 — OTHER INCOME - Other	200	
Total 4050 — OTHER INCOME	31,244	
4055 — STUDENT SUCCESS FUND	18,630	14,233
4880 — REIMBURSEMENTS	3,500	1,005
4085 — MEDICARE REIMB.	5,000	0
Total 4090 — FUNDRAISING	36,400	14,577
Total Income	3,174,351	
Gross Profit		
Expense		
5000 — PERSONNEL		
5089 — Fellows	0	0
5088 — Vaction Programming	1,300	1,300
5100 - PAYROLL TAX		
Fam/Medical Leave	0	2,070
5120 — Work Comp	15,183	11,389
5117 — Unemployment	11,058	6,906
5116 — Medicare	33,325	15,106
5115 — Soc Sec	48,000	18,372
Total 5100 - Payroll Taxes	107,566	53,843
Salaries from worksheet	2,118,116	1,146,822
Total 5000 — PERSONNEL	2,225,682	
5140 — BENEFITS		
5141 — Health	378,000	139,695
5142 — Dental	28,000	14,532
5143 — Life & Disability	13,400	6,441
Total 5140 — BENEFITS	419,400	160,668
5150 — STAFF DEVELOPMENT	6,000	7,551
5160 — SEARCH COSTS	1,600	1,688
5200 — DIRECT STUDENT SUPPORT		
5255 — Homework Club	7,500	
5202 — Furnishings	1,000	21
5203 — Student Success Fund	15,000	5,132
5210 — Teachers supplies	5,000	2,223
5211 — Instructional Equipment	14,400	9,082
5215 — Curriculum supplies	5,000	1,987
5220 — Student supplies	5,000	382
5221 — SPED supplies	1,500	2,256
5222 — SPED Services	1,500	
5240 — Computer Support	2,000	95
5241 — Technology - Hardware	5,000	
5242 — Technology-Software	2,000	10,277
5250 — Nursing supplies	1,500	219
5290 — Vacation Programming	4,610	4,610
Total 5200 — DIRECT STUDENT SUPPORT	71,010	36,284
5300 — OCCUPANCY		
5320 — Maintenance		
Total 5320 — Maintenance	39,500	14,841
5330 — CustSvc	27,200	14,465
5340 — CustSupplies	5,000	1,372
5351 — Utilities		
5352 — Electric	28,500	16,472
5354 — Water	8,500	5,064
5355 — Communications	3,750	1,540
Total 5351 — Utilities	40,750	23,076
Total 5300 — OCCUPANCY	112,450	53,754
5400 — OFFICE & ADMIN		
5492 — Mortgage Interest	129,706	63,507
5405 — FundraisingExp		
5407 — Events		
5408 — Musical		
5405 — FundraisingExp - Other		
Total 5405 — FundraisingExp	5,650	3,113
5410 — Supplies	5,000	1,841
5430 — Accounting	18,000	19,450
5431 — Legal	15,000	1,196
5435 - Marketing	0	0
5440 — PayrollSvc	6,000	2,757
5450 — Printing&Copy	1,200	930
5460 — Postage	3,500	1,585
5470 — General Liability Insurance	28,717	14,611
5480 — Board	6,000	6,995
5486 — HoS Discretionary	1,500	645
5487 — Admissions	1,500	803
5497 — Bank Chrg	950	695
Total 5400 — OFFICE & ADMIN	222,723	118,128
6100 — Depreciation	94,572	47,858
Total Expense	3,153,437	425,931
Net Ordinary Income	20,914	
Net Income		

Cash Items not reflected:
Principal Repayment

Non-Cash Items to be added back:

Updated PPEs

9/12/2019

	<u>4</u>	<u>5</u>	<u>6</u>	<u>7</u>	<u>8</u>
Marblehead	16	38	31	9	24
Swampscott	19	5	14	2	1
Lynn	8	1	2	2	5
Salem		1	5	2	5
Saugus	1				
Peabody		3		1	1
Nahant	2	3		2	
Beverly		1		1	

		FY19 PPE	
Marblehead	118	\$14,545	\$1,716,310
Swampscott	41	\$14,247	\$584,127
Lynn	18	\$10,246	\$184,428
Salem	13	\$13,863	\$180,219
Saugus	1	\$15,675	\$15,675
Peabody	5	\$11,960	\$59,800
Nahant	7	\$14,218	\$99,526
Beverly	2	\$14,375	\$28,750
	205		\$2,868,835

		FY20 Projected		DESE 8/19
Marblehead	118	\$15,536	\$1,833,248	
Swampscott	41	\$16,295	\$668,095	
Lynn	18	\$12,968	\$233,424	
Salem	13	\$15,711	\$204,243	
Saugus	1	\$17,551	\$17,551	
Peabody	5	\$15,087	\$75,435	
Nahant	7	\$14,844	\$103,908	
Beverly	2	\$18,114	\$36,228	Average
	205		\$3,172,132	\$15,473.81
			\$3,072,227	
			\$99,905	

		FY19+5%	
Marblehead	118	\$15,272	\$1,802,126
Swampscott	41	\$14,959	\$613,333
Lynn	18	\$10,758	\$193,649

Salem	13	\$14,556	\$189,230
Saugus	1	\$16,459	\$16,459
Peabody	5	\$12,558	\$62,790
Nahant	7	\$14,929	\$104,502
Beverly	2	\$15,094	\$30,188
	205		\$3,012,277

TOTAL
118
41
18
13
1
5
7
2
205

		FY19 + 3%	
Marblehead	118	\$14,981	\$1,767,758
Swampscott	41	\$14,674	\$601,634
Lynn	18	\$10,553	\$189,954
Salem	13	\$14,279	\$185,627
Saugus	1	\$16,145	\$16,145
Peabody	5	\$12,319	\$61,594
Nahant	7	\$14,645	\$102,515
Beverly	2	\$14,806	\$29,613
	205		\$2,954,840

		FY19+ 3.5%	
Marblehead	118	\$15,054	\$1,776,381
Swampscott	41	\$14,764	\$605,324
Lynn	18	\$10,605	\$190,890
Salem	13	\$14,348	\$186,524
Saugus	1	\$16,224	\$16,224
Peabody	5	\$12,379	\$61,893
Nahant	7	\$14,716	\$103,012
Beverly	2	\$14,878	\$29,756
	205		\$2,970,004

		FY19+ 4%	
Marblehead	118	\$15,127	\$1,784,986
Swampscott	41	\$14,817	\$607,497
Lynn	18	\$10,656	\$191,808
Salem	13	\$14,817	\$192,621

Saugus	1	\$16,302	\$16,302
Peabody	5	\$12,438	\$62,192
Nahant	7	\$14,787	\$103,507
Beverly	2	\$14,950	\$29,900
	205		\$2,988,813

5 year history of PPEs Per Pupil Expenditure (State Allocation)

<u>District</u>	<u>FY15</u>	<u>FY16</u>	<u>FY17</u>	<u>FY18</u>
Marblehead	\$11,826	\$12,337	\$13,012	\$13,682
Salem	\$13,199	\$12,672	\$13,475	\$12,303
Swampscott	\$12,841	\$13,052	\$13,940	\$14,058
Lynn	\$10,092	\$9,585	\$9,783	\$11,027
Nahant	<u>\$11,630</u>	<u>\$12,729</u>	<u>\$12,973</u>	<u>\$13,247</u>
<i>Average</i>	\$11,918	\$12,075	\$12,637	\$12,863

Marblehead	<u>FY16</u>	<u>FY17</u>	<u>FY18</u>	<u>FY19</u>
<i>trend over time</i>	4.3%	5.5%	5.1%	6.3%

RAW DATA FROM DESE

FY15	FTE	Foundation	Above	Facilities
LYNN	13.5	9,190	9	893
MARBLEHEAD	182.1	8,149	2,784	893
NAHANT	4.0	7,901	2,836	893
PEABODY	5.0	9,487	1,357	893
SALEM	3.2	9,581	2,725	893
SWAMPSCOTT	14.0	7,776	4,172	893

FY16	FTE	Foundation	Above	Facilities
LYNN	9.4	8,691	1	893
MARBLEHEAD	184.3	8,212	3,232	893
NAHANT	5.1	8,146	3,690	893

PEABODY	6.0	9,434	1,217	893
SALEM	6.0	8,856	2,923	893
SWAMPSCOTT	17.6	7,924	4,235	893

FY17

LYNN	8.4	8,720	170	0
MARBLEHEAD	194.3	8,244	3,875	0
NAHANT	4.0	8,027	4,053	0
PEABODY	5.5	8,814	834	0
SALEM	9.0	9,043	3,539	0
SWAMPSCOTT	8.5	8,362	4,685	0

FY18

LYNN	16.24	9,723	411	0
MARBLEHEAD	170.50	8,433	4,356	0
NAHANT	2.00	8,183	4,171	0
PEABODY	9.50	8,890	1,533	0
SALEM	16.19	8,649	2,761	0
SWAMPSCOTT	15.00	8,174	4,991	0

FY19

BEVERLY	1.00	10,571	2,911	0
DANVERS	1.00	10,053	4,843	0
LYNN	16.23	9,249	104	0
MARBLEHEAD	161.74	8,868	4,784	0
NAHANT	1.92	8,580	4,745	0
PEABODY	9.70	9,288	1,779	0
SALEM	17.00	10,068	2,902	0
SWAMPSCOTT	18.76	8,610	4,744	0

FY20 Projected at August 2019

BEVERLY		9,123	2,512	0
LYNN		10,938	123	0
MARBLEHEAD		9,477	5,112	0
NAHANT		8,954	4,952	0
PEABODY		10,818	2,072	0
SALEM		9,892	2,852	0
SWAMPSCOTT		8,984	4,950	0

<u>FY19</u>	<u>FY20 (proj)</u>
\$14,545	\$15,527
\$13,863	\$13,682
\$14,247	\$14,872
\$10,246	\$11,999
<u>\$14,218</u>	<u>\$14,844</u>
\$13,424	\$14,185

FY20 (proj)
6.8%

<http://www.doe.mass.edu/charter/finance/>

PPE

10,092
11,826
11,630
11,737
13,199
12,841

0	9,585
0	12,337
0	12,729

0	11,544
0	12,672
0	13,052

893	9,783
893	13,012
893	12,973
893	10,541
893	13,475
893	13,940

893	11,027
893	13,682
893	13,247
893	11,316
893	12,303
893	14,058

893	14,375
893	15,789
893	10,246
893	14,545
893	14,218
893	11,960
893	13,863
893	14,247

938	12,573
938	11,999
938	15,527
938	14,844
938	13,828
938	13,682
938	14,872

FY20 PPEs by sending district

January 2020

		<u>FY20 Projected</u>	DESE 8/19
Marblehead	119	\$15,536	\$1,848,784
Swampscott	43	\$16,295	\$700,685
Lynn	18	\$12,968	\$233,424
Salem	12	\$15,711	\$188,532
Saugus	2	\$17,551	\$35,102
Peabody	5	\$15,087	\$75,435
Nahant	7	\$14,844	\$103,908
Beverly	1.5	\$18,114	\$27,171 anticipates loss of 1 student af
	207.5		\$3,213,041

There will be some minor pro-ration

FY20 Budget	\$ 3,072,227
	\$140,814
	Average
	\$15,484.53

		<u>FY20 Projected</u>	DESE 12/23/19
Marblehead	121	\$15,603	\$1,887,963
Swampscott	41	\$14,872	\$609,752
Lynn	18	\$11,885	\$213,930
Salem	13	\$13,022	\$169,286
Saugus	1	\$16,605	\$16,605
Peabody	5	\$13,639	\$68,195
Nahant	7	\$15,597	\$109,179
Beverly	1.5	\$12,487	\$18,731 withdrawl not official as of 1/3
	207.5		\$3,093,641

There will be some minor pro-ration

FY20 Budget	\$ 3,072,227
	\$21,414
	Average
	\$14,909.11

State allocation depts

	July	\$290,567 actual	230
	Aug	\$290,567 actual	230
	Sept	\$290,567 actual	230
	Oct	\$290,567 actual	230
	Nov	\$290,567 actual	230
	Dec	\$229,030 actual	205
	Jan	\$229,030 projected	should adjust to 207.5
	Feb	\$229,030 projected	
ter 12/19	Mar	\$229,030 projected	
	Apr	\$229,030 projected	
	May	\$229,030 projected	
	June	\$229,030 projected	
		\$3,056,045	

3/20, but the kid is gone

FY21 PPE calculations

		Found- ation Rate	Above Found- ation Rate	Facilities Rate	Total Rate
FY20	Sending				
as of Dec	BEVERLY	9,123	2,426	938	12,487
2019	LYNN	10,938	9	938	11,885
	MARBLEHEAD	9,477	5,188	938	15,603
	NAHANT	8,954	5,705	938	15,597
	PEABODY	10,818	1,883	938	13,639
	SALEM	9,892	2,192	938	13,022
	SAUGUS	11,379	4,288	938	16,605
	SWAMPSCOTT	8,984	4,950	938	14,872

		FY20 at Dec	+3%	AF Flat	Facilities
FY21	BEVERLY	9,123	9,397	2,426	938
Projected	LYNN	10,938	11,266	9	938
As per	MARBLEHEAD	9,477	9,761	5,188	938
memo	NAHANT	8,954	9,223	5,705	938
	PEABODY	10,818	11,143	1,883	938
	SALEM	9,892	10,189	2,192	938
	SAUGUS	11,379	11,720	4,288	938
	SWAMPSCOTT	8,984	9,254	4,950	938

		Foundation	AF	Facilities	
FY19	BEVERLY	10,571	2,911	893	14,375
Final	DANVERS	10,053	4,843	893	15,789
	LYNN	9,249	104	893	10,246
	MARBLEHEAD	8,868	4,784	893	14,545

NAHANT	8,580	4,745	893	14,218
PEABODY	9,288	1,779	893	11,960
SALEM	10,068	2,902	893	13,863
SWAMPSCOTT	8,610	4,744	893	14,247

Above Foundation rate comparison FY19-FY20 (projected)

	<u>FY19 final</u>	<u>FY20 proj.</u>		<u>Change</u>
BEVERLY	2,911	2,426	(\$485)	83%
LYNN	104	9	(\$95)	9%
MARBLEHEAD	4,784	5,188	\$404	108%
NAHANT	4,745	5,705	\$960	120%
PEABODY	1,779	1,883	\$104	106%
SALEM	2,902	2,192	(\$710)	76%
SAUGUS	4730*	4,288	(\$442)	91%
SWAMPSCOTT	4,744	4,950	\$206	104%

* average of available data

Scenario 1 - Foundation +3%, AF & Facilities flat

		FY20 at Dec	+3%
FY21	BEVERLY	9,123	9,397
Projected	LYNN	10,938	11,266
	MARBLEHEAD	9,477	9,761
	NAHANT	8,954	9,223
	PEABODY	10,818	11,143
	SALEM	9,892	10,189
	SAUGUS	11,379	11,720
	SWAMPSCOTT	8,984	9,254

	Student population - projected	PPE
	BEVERLY	1
12,761	LYNN	18
12,213	MARBLEHEAD	121
15,887	NAHANT	7
15,866	PEABODY	5
13,964	SALEM	13
13,319	SAUGUS	1
16,946	SWAMPSCOTT	41
15,142		207

Scenario 2 - Foundation +3%, AF follows trend, Facilities flat

		FY20 at Dec	+3%
FY21	BEVERLY	9,123	9,397
Projected	LYNN	10,938	11,266

MARBLEHEAD	9,477	9,761
NAHANT	8,954	9,223
PEABODY	10,818	11,143
SALEM	9,892	10,189
SAUGUS	11,379	11,720
SWAMPSCOTT	8,984	9,254

	Student population - projected	PPE
-7%	BEVERLY	1 12,348
-91%	LYNN	18 12,213
+8%	MARBLEHEAD	121 16,302
+20%	NAHANT	7 17,007
+6%	PEABODY	5 14,077
-24%	SALEM	13 12,793
-9%	SAUGUS	1 16,560
+4%	SWAMPSCOTT	41 15,340
		207

FY20 Budget	\$3,072,227	
Scenario 1	\$3,146,731	
Scenario 2	\$3,205,984	\$59,252
Scenario 2 + 3 students (210)		\$3,252,447

DESE FY21 Projection (Januray)

April update 4/8/2020 DESE data from

	FY20 at	
	March 2020	Above Found.
FY20 Q3 BEVERLY	9,123	2,429

Estimates	LYNN	10,938	0
	MARBLEHEAD	9,477	5,039
	NAHANT	8,954	5,183
	PEABODY	10,818	1,768
	SALEM	9,892	2,139
	SAUGUS	11,379	4,227
	SWAMPSCOTT	8,984	4,408

	Student population - projected	PPE
BEVERLY	1	12,490
LYNN	18	11,876
MARBLEHEAD	121	15,454
NAHANT	7	15,075
PEABODY	5	13,524
SALEM	13	12,969
SAUGUS	1	16,544
SWAMPSCOTT	<u>41</u>	14,330
	207	

210 students \$3,086,095

<u>AF Flat</u>	<u>Facilities</u>	<u>PPE</u>
2,426	938	12,761
9	938	12,213
5,188	938	15,887
5,705	938	15,866
1,883	938	13,964
2,192	938	13,319
4,288	938	16,946
4,950	938	15,142

TOTAL

12,761	
219,837	
1,922,365	
111,059	
69,818	
173,144	
16,946	
<u>620,802</u>	Weighted avg
3,146,731	\$ 15,201.60

<u>AF</u>	<u>Facilities</u>	<u>PPE</u>	
2,014	938	12,348	-7%
9	938	12,213	-91%

5,603	938	16,302	+8%
6,846	938	17,007	+20%
1,996	938	14,077	+6%
1,666	938	12,793	-24%
3,902	938	16,560	-9%
5,148	938	15,340	+4%

TOTAL

12,348
 219,837
 1,972,584
 119,046
 70,383
 166,305
 16,560
628,920
3,205,984

Weighted avg
\$ 15,487.84

Weighted avg
\$ 15,643.95

1 3/24/20

<u>Facilities</u>	<u>PPE</u>
938	12,490

938	11,876
938	15,454
938	15,075
938	13,524
938	12,969
938	16,544
938	14,330

TOTAL

12,490
213,768
1,869,934
105,525
67,620
168,597
16,544
<u>587,530</u>
3,042,008

Weighted avg
\$ 14,695.69

Marblehead Community Charter Public School

Financial Results As of Mar 31, 2020



Prepared and reviewed by:
Jeff Barry - MCCPS Business Manager (jbarry@marbleheadcharter.com)
Rodolphe Hervé - MCCPS Treasurer (rherve@marbleheadcharter.com)

MCCPS

Balance Sheet Standard

As of Mar 31, 2020

	Accrual Basis				Increase /	
	Jan 31, '20	Feb 29, '20	Mar 31, '20	Mar 31, '19	(Decrease)	%age
ASSETS						
Current Assets						
Checking/Savings						
1073 — EBSB Payroll (8947)	16,741	12,852	12,460	22,994	(10,535)	-45.8%
1072 — EBSB Operating (8934)	449,356	438,643	427,660	285,634	142,026	49.7%
1010 — Charter Hall (8202)	2,670	2,670	2,670	2,895	(226)	-7.8%
1040 — Petty Cash (4534)	392	1,930	1,317	2,842	(1,526)	-53.7%
1070 — Checking (4542)	107,418	115,533	118,892	88,197	30,695	34.8%
1085 — PayPal	5,641	9,317	3,002	4,635	(1,634)	-35.2%
1090 — FoodService (5077)	10,868	11,796	4,993	12,296	(7,303)	-59.4%
Total Checking/Savings	593,085	592,742	570,993	419,495	151,498	36.1%
Accounts Receivable						
1200 — Accounts Receivable	0	0	0	0	0	
1201 — Grants Receivable	0	0	0	0	0	
Total Accounts Receivable	0	0	0	0	0	
Other Current Assets						
1310 — Prepaid Expense	34,227	34,227	34,227	0	34,227	
1210 — State Allocation Receivable	0	0	0	0	0	
Total Other Current Assets	34,227	34,227	34,227	0	34,227	
Total Current Assets	627,312	626,969	605,220	419,495	185,725	44.3%
Fixed Assets						
1532 — 17 Lime Street						
1533 — Land - 17 Lime Street	687,400	687,400	687,400	687,400	0	0.0%
1532 — 17 Lime Street - Other	3,562,600	3,562,600	3,562,600	3,562,600	0	0.0%
Total 1532 — 17 Lime Street	4,250,000	4,250,000	4,250,000	4,250,000	0	0.0%
1530 — Building Improvements	33,184	33,184	33,184	33,184	0	0.0%
1531 — Fixed Assets	66,648	66,648	66,648	86,648	(20,000)	-23.1%
1599 — Accumulated Depreciation	(576,762)	(584,738)	(592,715)	(517,189)	(75,526)	14.6%
Total Fixed Assets	3,773,071	3,765,094	3,757,118	3,852,644	(95,526)	-2.5%
TOTAL ASSETS	4,400,383	4,392,063	4,362,338	4,272,139	90,199	2.1%
LIABILITIES & EQUITY						
Liabilities						
Current Liabilities						
Accounts Payable						
2000 — Accounts Payable	(26,265)	(200)	(200)	328	(528)	-160.9%
2010 — Accounts Payable FS	0	0	2,007	4,328	0	0.0%
Total Accounts Payable	(26,265)	(200)	1,807	4,656	(2,849)	-61.2%
Other Current Liabilities						
2110 — Accrued Payroll	117,331	117,331	117,331	137,734	(20,403)	-14.8%
2110-25 — Payroll Liabilities	(1,820)	(3,968)	(5,805)	(1,559)	(4,246)	272.3%
2111 — Accrued Payroll Taxes	3,990	3,990	3,990	4,661	(671)	-14.4%
2160-25 — MTRB Liability	13,025	12,693	12,361	12,865	(504)	-3.9%
2190-25 — Payroll Clearing Account	25,233	12,255	5,978	12,052	(6,074)	-50.4%
2230 — Accrued Expenses	40,979	40,979	40,979	40,978	0	0.0%
Total Other Current Liabilities	198,737	183,279	174,833	206,731	(31,898)	-15.4%
Total Current Liabilities	172,472	183,079	176,640	211,387	(34,747)	-16.4%
Long Term Liabilities						
2613 — East Boston Savings Bank	3,761,180	3,753,132	3,744,375	3,841,791	(97,416)	-2.5%
Total Long Term Liabilities	3,761,180	3,753,132	3,744,375	3,841,791	(97,416)	-2.5%
Total Liabilities	3,933,652	3,936,211	3,921,015	4,053,178	(132,163)	-3.3%
Equity						
3000 — Opening Bal Equity	(295)	(295)	(295)	(295)	0	0.0%
3900 — Retained Earnings	268,101	268,101	268,101	331,031	(62,930)	-19.0%
Net Income	198,925	188,046	173,516	(111,775)	285,292	-255.2%
Total Equity	466,731	455,852	441,323	218,961	222,362	101.6%
TOTAL LIABILITIES & EQUITY	4,400,383	4,392,063	4,362,338	4,272,139	90,199	2.1%

MCCPS

Profit and Loss Prev Year Comparison

July 2019 through March 2020

Accrual Basis

months YTD

9

	Jul '19 - Mar '20	Jul '18 - Mar '19	Increase / (Decrease)	%age	Budget	Over / (Under)	%age
Ordinary Income/Expense							
Income							
4057 — VACATION PROGRAMMING	7,250	15,538	(8,288)	-53.3%	5,438	1,813	33.3%
4005 — STATE ALLOCATION	2,365,967	2,397,465	(31,498)	-1.3%	2,304,170	61,797	2.7%
4030 — STUDENT ACTIVITIES	61	0					
4040 — INVESTMENT INCOME	86	68	18	26.0%	75	11	15.0%
4050 — OTHER INCOME	29,744	21,990	7,754	35.3%	23,433	6,311	26.9%
4055 — STUDENT SUCCESS FUND	15,923	17,440	(1,517)	-8.7%	13,973	1,951	14.0%
4080 — REIMBURSEMENTS	1,195	3,344	(2,149)	-64.3%	2,625	(1,430)	-54.5%
4085 — MEDICARE REIMB.	2,347	3,253	(906)	-27.9%	3,750	(1,403)	-37.4%
4090 — FUNDRAISING	20,120	19,395	725	3.7%	27,300	(7,180)	-26.3%
Total Income	2,442,693	2,478,494	(35,801)	-1.4%	2,380,763	61,930	2.6%
Gross Profit	2,442,693	2,478,494	(35,801)	-1.4%	2,380,763	61,930	2.6%
Expense							
5000 — PERSONNEL	1,697,996	1,772,045	(74,049)	-4.2%	1,669,262	28,734	1.7%
5140 — BENEFITS	231,031	297,618	(66,587)	-22.4%	314,550	(83,519)	-26.6%
5150 — STAFF DEVELOPMENT	8,854	9,174	(320)	-3.5%	4,500	4,354	96.8%
5160 — SEARCH COSTS	1,688	1,563	125	8.0%	1,200	488	40.7%
5170 — SUBSTITUTE	231	313	(81)		0	231	NA
5200 — DIRECT STUDENT SUPPORT	44,231	46,491	(2,259)	-4.9%	53,258	(9,026)	-16.9%
5300 — OCCUPANCY	73,096	103,953	(30,857)	-29.7%	84,338	(11,241)	-13.3%
5400 — OFFICE & ADMIN	163,263	232,115	(68,852)	-29.7%	167,042	(3,779)	-2.3%
6100 — Depreciation	71,788	70,929	858	1.2%	70,929	859	1.2%
Total Expense	2,292,178	2,534,201	(242,022)	-9.6%	2,365,078	(72,899)	-3.1%
Net Ordinary Income	150,515	(55,707)	206,222	-370.2%	15,686	134,829	859.6%
Net Income	150,515	(55,707)	206,222	-370.2%	15,686	134,829	859.6%

MCCPS

Profit and Loss Standard

July 2019 through March 2020

	Jul '19	Aug '19	Sep '19	Oct '19	Nov '19	Dec '19	Jan '20	Feb '20	Mar '20	Accrual Basis TOTAL
Ordinary Income/Expense										
Income										
4057 — VACATION PROGRAMMING	5,020	2,230								7,250
4005 — STATE ALLOCATION	287,579	290,567	290,567	290,567	290,567	229,030	229,030	229,030	229,030	2,365,967
4030 — STUDENT ACTIVITIES										
4038 — DC Trip									61	61
Total 4030 — STUDENT ACTIVITIES									61	61
4040 — INVESTMENT INCOME										
4041 — Int Inc						2				2
4040 — INVESTMENT INCOME - Other	7	14	8	11	12	9	9	9	5	84
Total 4040 — INVESTMENT INCOME	7	14	8	11	12	11	9	9	5	86
4050 — OTHER INCOME										
4051 — 17 Lime Rent		1,484	2,360	1,700	2,020	1,363	1,050	2,419	2,538	14,933
4054 — Misc. Inc.										
4054 — Misc. Inc. - Other		10,450	180		146		1,089		5	11,870
Total 4054 — Misc. Inc.		10,450	180		146		1,089		5	11,870
4056 — Homework Club		197		742	100			200	1,702	2,941
Total 4050 — OTHER INCOME		12,131	2,540	2,442	2,266	1,363	2,139	2,619	4,245	29,744
4055 — STUDENT SUCCESS FUND		5,948	5,886	1,549	250	600	1,250		440	15,923
4080 — REIMBURSEMENTS		1,005							190	1,195
4085 — MEDICARE REIMB.							2,347			2,347
4090 — FUNDRAISING										
4092 — Events		300		3,340	4,422	1,617	39	961	561	11,240
4094 — Musical					2,057				2,977	5,034
4090 — FUNDRAISING - Other		66	2,500	69		206	875	30	100	3,847
Total 4090 — FUNDRAISING		366	2,500	3,409	6,479	1,823	914	991	3,638	20,120
Total Income	292,606	312,260	301,501	297,978	299,574	232,827	235,689	232,650	237,608	2,442,693
Gross Profit	292,606	312,260	301,501	297,978	299,574	232,827	235,689	232,650	237,608	2,442,693
Expense										
5000 — PERSONNEL										
5088 — Vactaion Programming	1,300									1,300
Payroll Taxes										
5118 — MAPML				700	690	680	712	579	678	4,039
5115 — Soc Sec	2,713	3,071	3,351	3,257	3,031	2,949	3,324	2,968	3,281	27,944
5116 — Medicare	2,488	2,289	2,566	2,621	2,578	2,564	2,646	2,509	2,542	22,803
5117 — Unemployment	1,175	1,070	1,003	1,264	1,213	1,181	1,596	1,493	1,442	11,437
5120 — Work Comp	4,055	1,386	1,796	1,384	1,384	1,384	1,384	1,384	1,384	15,541
Total Payroll Taxes	10,431	7,816	8,716	9,227	8,896	8,757	9,661	8,934	9,327	81,765
Total 5000 — PERSONNEL	184,914	169,624	191,345	207,056	200,848	193,022	187,142	183,794	180,250	1,697,996
5140 — BENEFITS										
5141 — Health										
5141 — Health - Other	10,679	23,646	23,559	23,918	34,051	20,341	24,298	17,647	22,365	200,503
Total 5141 — Health	10,679	23,646	23,559	23,918	34,051	20,341	24,298	17,647	22,365	200,503
5142 — Dental	2,534	2,651	2,495	2,025	2,414	2,414	2,433	2,161	2,025	21,151
5143 — Life & Disability	1,415	1,743	621	887	1,774		887	1,141	909	9,377
Total 5140 — BENEFITS	14,628	28,040	26,676	26,830	38,238	22,754	27,618	20,949	25,298	231,031
5150 — STAFF DEVELOPMENT										
5150 — STAFF DEVELOPMENT - Other			7,482			68	500	745	59	8,854
Total 5150 — STAFF DEVELOPMENT			7,482			68	500	745	59	8,854
5160 — SEARCH COSTS			1,688							1,688
5170 — SUBSTITUTE						231				231
5200 — DIRECT STUDENT SUPPORT										
5255 — Homework Club			413	344	286	212	105	274	409	2,042
5202 — Furnishings										
5202 — Furnishings - Other		21								21
Total 5202 — Furnishings		21								21
5203 — Student Success Fund		1,450	1,740	1,237		705	399	790	370	6,691
5210 — Teachers supplies										
5210 — Teachers supplies - Other	54	375	361	409	573	452	197	361	105	2,886
Total 5210 — Teachers supplies	54	375	361	409	573	452	197	361	105	2,886
5211 — Instructional Equipment	1,968	1,019	1,941	1,511	1,221	1,423	202	1,423	1,019	11,726
5215 — Curriculum supplies										
5215 — Curriculum supplies - Other	75	847	388	232	149	297	103	242	99	2,431
Total 5215 — Curriculum supplies	75	847	388	232	149	297	103	242	99	2,431
5220 — Student supplies	47	138	37		146	14	78	48	100	608
5221 — SPED supplies	1,566				690					2,256
5240 — Computer Support										
5240 — Computer Support - Other		27	25	43			192	75		362
Total 5240 — Computer Support		27	25	43			192	75		362
5241 — Technology - Hardware										
5241 — Technology - Hardware - Other										
Total 5241 — Technology - Hardware										
5242 — Technology-Software	3,428	6,729				120				10,277
5250 — Nursing supplies										
5250 — Nursing supplies - Other			167			52				219
Total 5250 — Nursing supplies			167			52				219
5260 — Enrichment						102				102
5290 — Vacation Programming	1,575	3,035								4,610
Total 5200 — DIRECT STUDENT SUPPORT	8,713	13,640	5,071	3,775	3,065	3,377	1,276	3,213	2,101	44,231

MCCPS

Profit and Loss Standard

July 2019 through March 2020

	Jul '19	Aug '19	Sep '19	Oct '19	Nov '19	Dec '19	Jan '20	Feb '20	Mar '20	Accrual Basis TOTAL
5300 — OCCUPANCY										
5320 — Maintenance										
5322 — equip				269				234		503
5323 — HVAC					1,490					1,490
5325 — supplies			91		25	55				171
5326 — Repairs						379	(175)		359	563
5320 — Maintenance - Other	1,030	2,725	4,358	724	1,514	2,181	(1,096)	2,663	1,213	15,313
Total 5320 — Maintenance	1,030	2,725	4,449	993	3,029	2,615	(1,271)	2,897	1,572	18,039
5330 — CustSvc		3,065	2,850	2,850	2,850	2,850	2,850	2,138	2,332	21,785
5340 — CustSupplies			310	665	77	320	268	737	270	2,647
5351 — Utilities										
5352 — Electric		888	4,414	6,832	1,171	3,166		5,025	599	22,095
5354 — Water	703	1,983			2,378	(2,500)		1,406	2,369	6,338
5355 — Communications	298	48	548	48	550	48	557	48	48	2,193
Total 5351 — Utilities	1,001	2,919	4,963	6,880	4,099	714	557	6,478	3,015	30,626
Total 5300 — OCCUPANCY	2,031	8,708	12,572	11,388	10,055	6,499	2,404	12,250	7,190	73,096
5400 — OFFICE & ADMIN										
5465 — MCCPS PTO Transfer						260				260
5492 — Mortgage Interest	10,466	10,792	10,769	10,400	10,723	10,356	10,677	10,654	9,946	94,784
5405 — FundraisingExp										
5409 — 25th Anniversary								350		350
5407 — Events					1,051	100				1,151
5408 — Musical						250				250
5405 — FundraisingExp - Other		66	1,248		397		(100)			1,612
Total 5405 — FundraisingExp		66	1,248		1,699	100	(100)	350		3,363
5410 — Supplies										
5410 — Supplies - Other	168	390	190	114	321	658	251	45	202	2,339
Total 5410 — Supplies	168	390	190	114	321	658	251	45	202	2,339
5430 — Accounting			11,330		7,820	(2,550)		700	84	17,384
5431 — Legal		170	2,079	(1,153)	100		60			1,256
5440 — PayrollSvc	491	419	446	464	473	464	812	482	473	4,524
5450 — Printing&Copy			930							930
5460 — Postage	45	480		404		656		428	13	2,026
5470 — General Liability Insurance	504	4,702	2,351	2,351	2,351	2,351	2,351	2,351	2,351	21,664
5480 — Board						6,995			5,000	11,995
5486 — HoS Discretionary										
5486 — HoS Discretionary - Other		480			165		20	223	167	1,056
Total 5486 — HoS Discretionary		480			165		20	223	167	1,056
5487 — Admissions			432		50	322	24			827
5497 — Bank Chrg	128	66	275	71	59	96	47	54	60	856
Total 5400 — OFFICE & ADMIN	11,803	17,565	30,049	12,651	23,761	19,708	14,143	15,287	18,296	163,263
6100 — Depreciation	7,976	7,976	7,976	7,976	7,976	7,976	7,976	7,976	7,976	71,788
Total Expense	230,066	245,554	282,860	269,677	283,944	253,636	241,059	244,213	241,170	2,292,178
Net Ordinary Income	62,540	66,706	18,641	28,301	15,630	(20,809)	(5,370)	(11,563)	(3,561)	150,515
Net Income	62,540	66,706	18,641	28,301	15,630	(20,809)	(5,370)	(11,563)	(3,561)	150,515

MCCPS
Profit and Loss by Class
 July 2019 through March 2020

Ordinary Income/Expense	27-DC trip 22 - Athletics 1 - Nature's Classroom - Project Adventur 25 - Field Trips											40-sped 94-142 61-Title 1 63 - Title 4 - Teacher Quality (140)				94-FMPSGrant -MCCPSEdFoundGrant			Accrual Basis	TOTAL
	01 - General Fund	20-school lunch	11 - Student Activities	11 - Student Activities	11 - Student Activities	11 - Student Activities	11 - Student Activities	11 - Student Activities	30 - Enrichment	(90 Federal Grants)	(90 Federal Grants)	(90 Federal Grants)	(90 Federal Grants)	total 90 Federal Gran	(92 Private Grants)	(92 Private Grants)	(92 Private Grants)	Inclassific		
Income																				
4057 - VACATION PROGRAMMING		7,250.00																	7,250.00	
4005 - STATE ALLOCATION	2,365,967.00																		2,365,967.00	
4010 - FEDERAL & STATE GRANTS																			39,077.00	
4020 - SCHOOL LUNCH		66,453.57																	66,453.57	
4030 - STUDENT ACTIVITIES		61.00	700.00	10,970.35	13,690.00	2,160.00	4,342.00	31,862.35		23,642.00	11,064.00	1,000.00	3,371.00	39,077.00				31,923.35		
4040 - INVESTMENT INCOME		86.25																	86.25	
4050 - OTHER INCOME		23,744.06							10,890.13										40,634.19	
4055 - STUDENT SUCCESS FUND		15,923.02																	15,923.02	
4070 - PRIVATE GRANTS															1,585.00		1,585.00	1,585.00		
4080 - REIMBURSEMENTS		1,194.79																	1,194.79	
4005 - MEDICARE REIMB.		2,346.74																	2,346.74	
4090 - FUNDRAISING		20,120.20																	20,120.20	
Total Income	2,442,693.06	66,453.57	700.00	10,970.35	13,690.00	2,160.00	4,342.00	31,862.35	10,890.13	23,642.00	11,064.00	1,000.00	3,371.00	39,077.00	1,585.00	1,585.00	1,585.00	2,592,561.11		
Gross Profit	2,442,693.06	66,453.57	700.00	10,970.35	13,690.00	2,160.00	4,342.00	31,862.35	10,890.13	23,642.00	11,064.00	1,000.00	3,371.00	39,077.00	1,585.00	1,585.00	1,585.00	2,592,561.11		
Expense																				
5000 - PERSONNEL		1,697,995.77		2,000.00				2,000.00											1,734,182.20	
5140 - BENEFITS		231,031.30																	231,031.30	
5150 - STAFF DEVELOPMENT		8,854.18								900.00			1,223.98	2,123.98				10,978.16		
5160 - SEARCH COSTS		1,687.81																1,687.81		
5170 - SUBSTITUTE		231.25																231.25		
5200 - DIRECT STUDENT SUPPORT		44,231.28							2,194.44	16,770.37	546.70			17,317.07	2,457.86		2,457.86	66,200.65		
5261 - STUDENT ACTIVITY																		20,294.62		
5270 - SCHOOL LUNCH EXP		41,114.75		11,840.62	2,600.00	2,400.00	3,454.00	20,294.62										41,114.75		
5300 - OCCUPANCY		73,096.08		16.99				16.99											75,866.45	
5400 - OFFICE & ADMIN		163,263.18						360.00										163,263.18		
6100 - Depreciation		71,787.51																71,787.51		
Total Expense	2,292,178.36	70,603.88	13,857.61	2,600.00	2,400.00	3,454.00	22,311.61	2,554.44	25,121.05	546.70	1,223.98	26,891.73	2,457.86	2,457.86	(872.86)	(872.86)	(872.86)	2,416,997.86		
Net Ordinary Income	150,514.70	(4,150.31)	700.00	(2,887.26)	11,090.00	(240.00)	888.00	9,550.74	8,335.69	(1,479.05)	10,517.30	1,000.00	2,147.02	12,185.27	(872.86)	(872.86)	(872.86)	175,563.23		
Other Income/Expense																				
Other Expense																				
999 - ASK ACCOUNTANT																			39.94	
Total Other Expense																			39.94	
Net Other Income																			(39.94)	
Net Income	150,514.70	(4,150.31)	700.00	(2,887.26)	11,090.00	(240.00)	888.00	9,550.74	8,335.69	(1,479.05)	10,517.30	1,000.00	2,147.02	12,185.27	(872.86)	(872.86)	(872.86)	175,523.29		

**MCCPS
Financial Ratios**

As of Mar 31, 2020

months YTD

9

Debt Service Coverage Ratio	TBD
Days of Cash	70
LUNA (liquid unrestricted net assets)	2.38

Debt Service Coverage Ratio	
Standard monthly payment (Principal and Interest)	10,532
Net operating Income	150,515
Projected based on YTD results	20,914
Calculated Debt Service Ratio	TBD

Debt-Service Coverage Ratio (DSCR) is a measure of the cash flow available to pay current debt obligations. The ratio states net operating income as a multiple of debt obligations due within one year, including interest, principal, sinking-fund and lease payments.

Days Cash	
Cash on Hand	570,993
Operating Expense Annualized	2,292,178 3,056,238
Noncash expense Depreciation Annualized	71,788 95,717
Days Cash	70

$$\text{Cash on hand} \div ((\text{Operating expenses} - \text{Noncash expenses}) \div 365)$$

Liquid Unrestricted Net Assets	
Unrestricted Net Assets	4,362,338
Fixed Assets	3,757,118
Liquid Unrestricted NA	605,220
Expense (YTD) Monthly	2,292,178 254,686
LUNA	2.38

Steps to Calculate LUNA and months of liquidity
Step 1. Calculate LUNA:
 Subtract fixed assets from unrestricted net assets (property and equipment minus debt owed) = liquid unrestricted net assets (LUNA)
Step 2. Divide LUNA by monthly expense

$$\text{LUNA} / \text{monthly expense} = \text{months of liquidity}$$

MCCPS

FY20 adjusted operating budget

Revised 10/12/19

APPROVED BUDGET

Using FY20
Projected PPES

Ordinary Income/Expense
Income

4057 — VACATION PROGRAMMING	7,250	actual
4005 — STATE ALLOCATION	3,072,227	
Total 4040 — INVESTMENT INCOME	100	
Total 4050 — OTHER INCOME	31,244	
4055 — STUDENT SUCCESS FUND	18,630	
4080 — REIMBURSEMENTS	3,500	
4085 — MEDICARE REIMB.	5,000	
Total 4090 — FUNDRAISING	36,400	
Total Income	3,174,351	
Gross Profit		
Expense		
Total 5000 — PERSONNEL	2,225,682	
Total 5140 — BENEFITS	419,400	
5150 — STAFF DEVELOPMENT	6,000	
5160 — SEARCH COSTS	1,600	
Total 5200 — DIRECT STUDENT SUPPORT	71,010	
Total 5300 — OCCUPANCY	112,450	
Total 5400 — OFFICE & ADMIN	222,723	
6100 — Depreciation	94,572	
Total Expense	3,153,437	
Net Ordinary Income	20,914	