

U.S. Department of Education
Washington, D.C. 20202-5335



APPLICATION FOR GRANTS
UNDER THE

FY 2016 TIF Competition 84.374A

CFDA # 84.374A

PR/Award # U374A160071

Grants.gov Tracking#: GRANT12216235

OMB No. , Expiration Date:

Closing Date: Jul 15, 2016

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This application was generated using the PDF functionality. The PDF functionality automatically numbers the pages in this application. Some pages/sections of this application may contain 2 sets of page numbers, one set created by the applicant and the other set created by e-Application's PDF functionality. Page numbers created by the e-Application PDF functionality will be preceded by the letter e (for example, e1, e2, e3, etc.).

Application for Federal Assistance SF-424

* 1. Type of Submission: <input type="checkbox"/> Preapplication <input checked="" type="checkbox"/> Application <input type="checkbox"/> Changed/Corrected Application	* 2. Type of Application: <input checked="" type="checkbox"/> New <input type="checkbox"/> Continuation <input type="checkbox"/> Revision	* If Revision, select appropriate letter(s): <input type="text"/> * Other (Specify): <input type="text"/>
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* 3. Date Received: <input type="text" value="07/15/2016"/>	4. Applicant Identifier: <input type="text"/>
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5a. Federal Entity Identifier: <input type="text"/>	5b. Federal Award Identifier: <input type="text"/>
--	---

State Use Only:

6. Date Received by State: <input type="text"/>	7. State Application Identifier: <input type="text"/>
---	---

8. APPLICANT INFORMATION:

* a. Legal Name: <input type="text" value="Mastery Charter High School"/>	
* b. Employer/Taxpayer Identification Number (EIN/TIN): <input type="text" value="23-3060542"/>	* c. Organizational DUNS: <input type="text" value="0392802890000"/>

d. Address:

* Street1:	<input type="text" value="35 South 4th Street"/>
Street2:	<input type="text"/>
* City:	<input type="text" value="Philadelphia"/>
County/Parish:	<input type="text"/>
* State:	<input type="text" value="PA: Pennsylvania"/>
Province:	<input type="text"/>
* Country:	<input type="text" value="USA: UNITED STATES"/>
* Zip / Postal Code:	<input type="text" value="19106-2710"/>

e. Organizational Unit:

Department Name: <input type="text"/>	Division Name: <input type="text"/>
---------------------------------------	-------------------------------------

f. Name and contact information of person to be contacted on matters involving this application:

Prefix: <input type="text"/>	* First Name: <input type="text" value="Courtney"/>
Middle Name: <input type="text"/>	
* Last Name: <input type="text" value="Collins-Shapiro"/>	
Suffix: <input type="text"/>	

Title: <input type="text" value="Chief Innovation Officer"/>
--

Organizational Affiliation: <input type="text"/>
--

* Telephone Number: <input type="text"/>	Fax Number: <input type="text"/>
--	----------------------------------

* Email: <input type="text"/>

Application for Federal Assistance SF-424

*** 9. Type of Applicant 1: Select Applicant Type:**

M: Nonprofit with 501C3 IRS Status (Other than Institution of Higher Education)

Type of Applicant 2: Select Applicant Type:

Type of Applicant 3: Select Applicant Type:

* Other (specify):

*** 10. Name of Federal Agency:**

U.S. Department of Education

11. Catalog of Federal Domestic Assistance Number:

84.374

CFDA Title:

Teacher Incentive Fund

*** 12. Funding Opportunity Number:**

ED-GRANTS-053116-002

* Title:

Office of Innovation and Improvement (OII): Teacher Incentive Fund (TIF) CFDA Number 84.374A

13. Competition Identification Number:

84-374A2016-2

Title:

14. Areas Affected by Project (Cities, Counties, States, etc.):

AreasAffectedbyProject-MCS.pdf

Add Attachment

Delete Attachment

View Attachment

*** 15. Descriptive Title of Applicant's Project:**

Mastery 3.0 Opportunity Culture Human Capital Management System Redesign Project

Attach supporting documents as specified in agency instructions.

Add Attachments Delete Attachments View Attachments

Application for Federal Assistance SF-424

16. Congressional Districts Of:

* a. Applicant

* b. Program/Project

Attach an additional list of Program/Project Congressional Districts if needed.

17. Proposed Project:

* a. Start Date:

* b. End Date:

18. Estimated Funding (\$):

* a. Federal	<input type="text" value="2,142,327.00"/>
* b. Applicant	<input type="text" value="3,069,000.00"/>
* c. State	<input type="text" value="0.00"/>
* d. Local	<input type="text" value="0.00"/>
* e. Other	<input type="text" value="0.00"/>
* f. Program Income	<input type="text" value="0.00"/>
* g. TOTAL	<input type="text" value="5,211,327.00"/>

*** 19. Is Application Subject to Review By State Under Executive Order 12372 Process?**

a. This application was made available to the State under the Executive Order 12372 Process for review on

b. Program is subject to E.O. 12372 but has not been selected by the State for review.

c. Program is not covered by E.O. 12372.

*** 20. Is the Applicant Delinquent On Any Federal Debt? (If "Yes," provide explanation in attachment.)**

Yes No

If "Yes", provide explanation and attach

21. *By signing this application, I certify (1) to the statements contained in the list of certifications and (2) that the statements herein are true, complete and accurate to the best of my knowledge. I also provide the required assurances** and agree to comply with any resulting terms if I accept an award. I am aware that any false, fictitious, or fraudulent statements or claims may subject me to criminal, civil, or administrative penalties. (U.S. Code, Title 218, Section 1001)**

** I AGREE

** The list of certifications and assurances, or an internet site where you may obtain this list, is contained in the announcement or agency specific instructions.

Authorized Representative:

Prefix: * First Name:

Middle Name:

* Last Name:

Suffix:

* Title:

* Telephone Number: Fax Number:

* Email:

* Signature of Authorized Representative: * Date Signed:

Application for Federal Assistance SF-424

16. Congressional Districts Of:
* a. Applicant PA-001 * b. Program/Project PA-001

Attach an additional list of Program/Project Congressional Districts if needed.
CongressionalDistricts-MCS.pdf [Add Attachment](#) [Delete Attachment](#) [View Attachment](#)

17. Proposed Project:
* a. Start Date: 10/01/2016 * b. End Date: 09/30/2021

18. Estimated Funding (\$):
* a. Federal
* b. Applicant
* c. State
* d. Local
* e. Other
* f. Program Income
* g. TOTAL

*** 19. Is Application Subject to Review By State Under Executive Order 12372 Process?**
a. This application was made available to the State under the Executive Order 12372 Process for review on
b. Program is subject to E.O. 12372 but has not been selected by the State for review.
c. Program is not covered by E.O. 12372.

*** 20. Is the Applicant Delinquent On Any Federal Debt? (If "Yes," provide explanation in attachment.)**
Yes No
If "Yes", provide explanation and attach
[Add Attachment](#) [Delete Attachment](#) [View Attachment](#)

21. *By signing this application, I certify (1) to the statements contained in the list of certifications and (2) that the statements herein are true, complete and accurate to the best of my knowledge. I also provide the required assurances** and agree to comply with any resulting terms if I accept an award. I am aware that any false, fictitious, or fraudulent statements or claims may subject me to criminal, civil, or administrative penalties. (U.S. Code, Title 218, Section 1001)**
**** I AGREE**
** The list of certifications and assurances, or an internet site where you may obtain this list, is contained in the announcement or agency specific instructions.

Authorized Representative:

Prefix:		* First Name:	Scott
Middle Name:			
* Last Name:	Gordon		
Suffix:			
* Title:	Chief Executive Officer		
* Telephone Number:		Fax Number:	
* Email:			
* Signature of Authorized Representative:	Natalie Lucas	* Date Signed:	07/15/2016

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2,142,327.00
3,069,000.00
0.00
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0.00
5,211,327.00

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TIF 5 Application
Mastery Charter Schools: Areas Affected by Project

1. Philadelphia, PA (Philadelphia County)
2. Camden, NJ (Camden County)

TIF 5 Application
Mastery Charter Schools: Project Congressional Districts

1. PA 1
2. PA 2
3. NJ 1

ASSURANCES - NON-CONSTRUCTION PROGRAMS

Public reporting burden for this collection of information is estimated to average 15 minutes per response, including time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. Send comments regarding the burden estimate or any other aspect of this collection of information, including suggestions for reducing this burden, to the Office of Management and Budget, Paperwork Reduction Project (0348-0040), Washington, DC 20503.

PLEASE DO NOT RETURN YOUR COMPLETED FORM TO THE OFFICE OF MANAGEMENT AND BUDGET. SEND IT TO THE ADDRESS PROVIDED BY THE SPONSORING AGENCY.

NOTE: Certain of these assurances may not be applicable to your project or program. If you have questions, please contact the awarding agency. Further, certain Federal awarding agencies may require applicants to certify to additional assurances. If such is the case, you will be notified.

As the duly authorized representative of the applicant, I certify that the applicant:

1. Has the legal authority to apply for Federal assistance and the institutional, managerial and financial capability (including funds sufficient to pay the non-Federal share of project cost) to ensure proper planning, management and completion of the project described in this application.
2. Will give the awarding agency, the Comptroller General of the United States and, if appropriate, the State, through any authorized representative, access to and the right to examine all records, books, papers, or documents related to the award; and will establish a proper accounting system in accordance with generally accepted accounting standards or agency directives.
3. Will establish safeguards to prohibit employees from using their positions for a purpose that constitutes or presents the appearance of personal or organizational conflict of interest, or personal gain.
4. Will initiate and complete the work within the applicable time frame after receipt of approval of the awarding agency.
5. Will comply with the Intergovernmental Personnel Act of 1970 (42 U.S.C. §§4728-4763) relating to prescribed standards for merit systems for programs funded under one of the 19 statutes or regulations specified in Appendix A of OPM's Standards for a Merit System of Personnel Administration (5 C.F.R. 900, Subpart F).
6. Will comply with all Federal statutes relating to nondiscrimination. These include but are not limited to: (a) Title VI of the Civil Rights Act of 1964 (P.L. 88-352) which prohibits discrimination on the basis of race, color or national origin; (b) Title IX of the Education Amendments of 1972, as amended (20 U.S.C. §§1681-1683, and 1685-1686), which prohibits discrimination on the basis of sex; (c) Section 504 of the Rehabilitation Act of 1973, as amended (29 U.S.C. §794), which prohibits discrimination on the basis of handicaps; (d) the Age Discrimination Act of 1975, as amended (42 U.S.C. §§6101-6107), which prohibits discrimination on the basis of age; (e) the Drug Abuse Office and Treatment Act of 1972 (P.L. 92-255), as amended, relating to nondiscrimination on the basis of drug abuse; (f) the Comprehensive Alcohol Abuse and Alcoholism Prevention, Treatment and Rehabilitation Act of 1970 (P.L. 91-616), as amended, relating to nondiscrimination on the basis of alcohol abuse or alcoholism; (g) §§523 and 527 of the Public Health Service Act of 1912 (42 U.S.C. §§290 dd-3 and 290 ee- 3), as amended, relating to confidentiality of alcohol and drug abuse patient records; (h) Title VIII of the Civil Rights Act of 1968 (42 U.S.C. §§3601 et seq.), as amended, relating to nondiscrimination in the sale, rental or financing of housing; (i) any other nondiscrimination provisions in the specific statute(s) under which application for Federal assistance is being made; and, (j) the requirements of any other nondiscrimination statute(s) which may apply to the application.
7. Will comply, or has already complied, with the requirements of Titles II and III of the Uniform Relocation Assistance and Real Property Acquisition Policies Act of 1970 (P.L. 91-646) which provide for fair and equitable treatment of persons displaced or whose property is acquired as a result of Federal or federally-assisted programs. These requirements apply to all interests in real property acquired for project purposes regardless of Federal participation in purchases.
8. Will comply, as applicable, with provisions of the Hatch Act (5 U.S.C. §§1501-1508 and 7324-7328) which limit the political activities of employees whose principal employment activities are funded in whole or in part with Federal funds.

9. Will comply, as applicable, with the provisions of the Davis-Bacon Act (40 U.S.C. §§276a to 276a-7), the Copeland Act (40 U.S.C. §276c and 18 U.S.C. §874), and the Contract Work Hours and Safety Standards Act (40 U.S.C. §§327-333), regarding labor standards for federally-assisted construction subagreements.
10. Will comply, if applicable, with flood insurance purchase requirements of Section 102(a) of the Flood Disaster Protection Act of 1973 (P.L. 93-234) which requires recipients in a special flood hazard area to participate in the program and to purchase flood insurance if the total cost of insurable construction and acquisition is \$10,000 or more.
11. Will comply with environmental standards which may be prescribed pursuant to the following: (a) institution of environmental quality control measures under the National Environmental Policy Act of 1969 (P.L. 91-190) and Executive Order (EO) 11514; (b) notification of violating facilities pursuant to EO 11738; (c) protection of wetlands pursuant to EO 11990; (d) evaluation of flood hazards in floodplains in accordance with EO 11988; (e) assurance of project consistency with the approved State management program developed under the Coastal Zone Management Act of 1972 (16 U.S.C. §§1451 et seq.); (f) conformity of Federal actions to State (Clean Air) Implementation Plans under Section 176(c) of the Clean Air Act of 1955, as amended (42 U.S.C. §§7401 et seq.); (g) protection of underground sources of drinking water under the Safe Drinking Water Act of 1974, as amended (P.L. 93-523); and, (h) protection of endangered species under the Endangered Species Act of 1973, as amended (P.L. 93-205).
12. Will comply with the Wild and Scenic Rivers Act of 1968 (16 U.S.C. §§1271 et seq.) related to protecting components or potential components of the national wild and scenic rivers system.
13. Will assist the awarding agency in assuring compliance with Section 106 of the National Historic Preservation Act of 1966, as amended (16 U.S.C. §470), EO 11593 (identification and protection of historic properties), and the Archaeological and Historic Preservation Act of 1974 (16 U.S.C. §§469a-1 et seq.).
14. Will comply with P.L. 93-348 regarding the protection of human subjects involved in research, development, and related activities supported by this award of assistance.
15. Will comply with the Laboratory Animal Welfare Act of 1966 (P.L. 89-544, as amended, 7 U.S.C. §§2131 et seq.) pertaining to the care, handling, and treatment of warm blooded animals held for research, teaching, or other activities supported by this award of assistance.
16. Will comply with the Lead-Based Paint Poisoning Prevention Act (42 U.S.C. §§4801 et seq.) which prohibits the use of lead-based paint in construction or rehabilitation of residence structures.
17. Will cause to be performed the required financial and compliance audits in accordance with the Single Audit Act Amendments of 1996 and OMB Circular No. A-133, "Audits of States, Local Governments, and Non-Profit Organizations."
18. Will comply with all applicable requirements of all other Federal laws, executive orders, regulations, and policies governing this program.
19. Will comply with the requirements of Section 106(g) of the Trafficking Victims Protection Act (TVPA) of 2000, as amended (22 U.S.C. 7104) which prohibits grant award recipients or a sub-recipient from (1) Engaging in severe forms of trafficking in persons during the period of time that the award is in effect (2) Procuring a commercial sex act during the period of time that the award is in effect or (3) Using forced labor in the performance of the award or subawards under the award.

<p>SIGNATURE OF AUTHORIZED CERTIFYING OFFICIAL</p> <p>Natalie Lucas</p>	<p>TITLE</p> <p>Chief Executive Officer</p>
<p>APPLICANT ORGANIZATION</p> <p>Mastery Charter High School</p>	<p>DATE SUBMITTED</p> <p>07/15/2016</p>

Standard Form 424B (Rev. 7-97) Back

DISCLOSURE OF LOBBYING ACTIVITIES

Complete this form to disclose lobbying activities pursuant to 31 U.S.C.1352

Approved by OMB
0348-0046

1. * Type of Federal Action: <input type="checkbox"/> a. contract <input checked="" type="checkbox"/> b. grant <input type="checkbox"/> c. cooperative agreement <input type="checkbox"/> d. loan <input type="checkbox"/> e. loan guarantee <input type="checkbox"/> f. loan insurance	2. * Status of Federal Action: <input type="checkbox"/> a. bid/offer/application <input checked="" type="checkbox"/> b. initial award <input type="checkbox"/> c. post-award	3. * Report Type: <input checked="" type="checkbox"/> a. initial filing <input type="checkbox"/> b. material change
--	--	--

4. Name and Address of Reporting Entity:

Prime SubAwardee

* Name:

* Street 1: Street 2:

* City: State: Zip:

Congressional District, if known:

5. If Reporting Entity in No.4 is Subawardee, Enter Name and Address of Prime:

6. * Federal Department/Agency: <input type="text" value="Education/OI"/>	7. * Federal Program Name/Description: <input type="text" value="Teacher Incentive Fund"/> CFDA Number, if applicable: <input type="text" value="84.374"/>
---	---

8. Federal Action Number, if known: <input type="text"/>	9. Award Amount, if known: \$ <input type="text"/>
--	--

10. a. Name and Address of Lobbying Registrant:

Prefix * First Name Middle Name

* Last Name Suffix

* Street 1: Street 2:

* City: State: Zip:

b. Individual Performing Services (including address if different from No. 10a)

Prefix * First Name Middle Name

* Last Name Suffix

* Street 1: Street 2:

* City: State: Zip:

11. Information requested through this form is authorized by title 31 U.S.C. section 1352. This disclosure of lobbying activities is a material representation of fact upon which reliance was placed by the tier above when the transaction was made or entered into. This disclosure is required pursuant to 31 U.S.C. 1352. This information will be reported to the Congress semi-annually and will be available for public inspection. Any person who fails to file the required disclosure shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.

* Signature:

* Name: Prefix * First Name Middle Name

* Last Name Suffix

Title: Telephone No.: Date:

Federal Use Only:	Authorized for Local Reproduction Standard Form - LLL (Rev. 7-97)
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PR/Award # U374A160071

NOTICE TO ALL APPLICANTS

OMB Number: 1894-0005
Expiration Date: 03/31/2017

The purpose of this enclosure is to inform you about a new provision in the Department of Education's General Education Provisions Act (GEPA) that applies to applicants for new grant awards under Department programs. This provision is Section 427 of GEPA, enacted as part of the Improving America's Schools Act of 1994 (Public Law (P.L.) 103-382).

To Whom Does This Provision Apply?

Section 427 of GEPA affects applicants for new grant awards under this program. **ALL APPLICANTS FOR NEW AWARDS MUST INCLUDE INFORMATION IN THEIR APPLICATIONS TO ADDRESS THIS NEW PROVISION IN ORDER TO RECEIVE FUNDING UNDER THIS PROGRAM.**

(If this program is a State-formula grant program, a State needs to provide this description only for projects or activities that it carries out with funds reserved for State-level uses. In addition, local school districts or other eligible applicants that apply to the State for funding need to provide this description in their applications to the State for funding. The State would be responsible for ensuring that the school district or other local entity has submitted a sufficient section 427 statement as described below.)

What Does This Provision Require?

Section 427 requires each applicant for funds (other than an individual person) to include in its application a description of the steps the applicant proposes to take to ensure equitable access to, and participation in, its Federally-assisted program for students, teachers, and other program beneficiaries with special needs. This provision allows applicants discretion in developing the required description. The statute highlights six types of barriers that can impede equitable access or participation: gender, race, national origin, color, disability, or age. Based on local circumstances, you should determine whether these or other barriers may prevent your students, teachers, etc. from such access or participation in, the Federally-funded project or activity. The description in your application of steps to be taken to overcome these barriers need not be lengthy; you may provide a clear and succinct description of how you plan to address those barriers that are applicable to your circumstances. In addition, the information may be provided in a single narrative, or, if appropriate, may

be discussed in connection with related topics in the application.

Section 427 is not intended to duplicate the requirements of civil rights statutes, but rather to ensure that, in designing their projects, applicants for Federal funds address equity concerns that may affect the ability of certain potential beneficiaries to fully participate in the project and to achieve to high standards. Consistent with program requirements and its approved application, an applicant may use the Federal funds awarded to it to eliminate barriers it identifies.

What are Examples of How an Applicant Might Satisfy the Requirement of This Provision?

The following examples may help illustrate how an applicant may comply with Section 427.

- (1) An applicant that proposes to carry out an adult literacy project serving, among others, adults with limited English proficiency, might describe in its application how it intends to distribute a brochure about the proposed project to such potential participants in their native language.
- (2) An applicant that proposes to develop instructional materials for classroom use might describe how it will make the materials available on audio tape or in braille for students who are blind.
- (3) An applicant that proposes to carry out a model science program for secondary students and is concerned that girls may be less likely than boys to enroll in the course, might indicate how it intends to conduct "outreach" efforts to girls, to encourage their enrollment.
- (4) An applicant that proposes a project to increase school safety might describe the special efforts it will take to address concern of lesbian, gay, bisexual, and transgender students, and efforts to reach out to and involve the families of LGBT students.

We recognize that many applicants may already be implementing effective steps to ensure equity of access and participation in their grant programs, and we appreciate your cooperation in responding to the requirements of this provision.

Estimated Burden Statement for GEPA Requirements

According to the Paperwork Reduction Act of 1995, no persons are required to respond to a collection of information unless such collection displays a valid OMB control number. Public reporting burden for this collection of information is estimated to average 1.5 hours per response, including time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. The obligation to respond to this collection is required to obtain or retain benefit (Public Law 103-382). Send comments regarding the burden estimate or any other aspect of this collection of information, including suggestions for reducing this burden, to the U.S. Department of Education, 400 Maryland Ave., SW, Washington, DC 20210-4537 or email ICDocketMgr@ed.gov and reference the OMB Control Number 1894-0005.

Optional - You may attach 1 file to this page.

Section 427 of GEPA.pdf

Add Attachment

Delete Attachment

View Attachment

Section 427 of GEPA

At Mastery Charter School, we operate high quality charter schools for low-income youth. As part of our standard practice we work to ensure access to and participation in all our programs for students, teachers, and other program beneficiaries with special needs. Barriers recognized under this statute: gender, race, national origin, color, disability, or age are all considered by the Mastery leadership and we believe that our programs and services are fully accessible. This document will address both how we remove participation barriers for students, as well as adult staff, parents, and community members who engage in our programs/ schools.

Adult Staff Access

Mastery Charter School has made accommodations for disabled staff at our schools. For example, we have a visually impaired math teacher for whom the following accommodations are made:

- Rather than provide a mastery issued laptop, the teacher requested to use her own specialized computer with Braille adapted keys and for us to load all our software and programs on to her machine. We did this and set up a compatible docking station with large screen in her classroom for her daily use.
- We arranged for her classroom to be close to one of the first floor entrances as she noted that navigating the building on a daily basis would be a burden.
- We arranged to purchase special, large-print teacher's guided for her use and had professional development materials reproduced in large print for her.
- Since her disability was a challenge to her meeting our typical timelines for turnaround of feedback on student work, we gave her extended time on all feedback and grading to accommodate her vision challenges.

While we have no physically handicapped faculty or staff at the present time, we have had several, as well as having temporarily handicapped staff due to injury. All our buildings are ADA compliant with ramps and elevators, as well as bathrooms accessible for wheelchair use. In cases where a teacher has had a physical disability, we work with him/her to locate their classroom in the most accessible part of the building that will not distract from the academic program. For example, if we have a 12th grade teacher with walking limitations and 12th grade is on the 4th floor, we will not move the teacher to the first floor, however, we will make sure they have easy access to the elevator and will move their classroom closer to the elevator when at all possible. Whenever we host a professional development program off site, we make sure the facility is ADA compliant and that special needs of our participants are accommodated.

Student Access:

The primary ways we comply with ensuring access to our programs for students, regardless of disability, is to fully comply with all regulations in IDEA. It is the policy of Mastery Charter School that all students with disabilities, regardless of the severity of their disability, who are in need of special education and related services, are identified, located, and evaluated. This responsibility is required by a Federal law called the Individuals with Disabilities Education Improvement Act of 2004, 20 U.S.C. 1200 et. seq. ("IDEIA 2004"). Chapter 711 of Title 22 of the Pennsylvania Code requires the publication of a notice to parents sufficient to inform parents of children applying to or already enrolled in Mastery Charter School of (1) available special education services and programs, (2) how to request those services and programs, and of (3) systematic screening activities that lead to the identification, location and evaluation of children with disabilities enrolled in Mastery Charter School. The purpose of this Annual Notice is to

comply with the school's obligations under Chapter 711 of Title 22 of the Pennsylvania Code.

This Annual Notice is made available both in the school's Parent-Student Handbook and on the school's website: www.masterycharter.org.

Qualifying for Special Education and Related Services

Under the Federal IDEIA 2004, there are two steps for a student to qualify for special education and related services. The first step is a finding that the student has one or more of the following disabilities that interfere with his or her educational performance: (1) autism or pervasive developmental disorder, (2) deaf-blindness, (3) deafness, (4) emotional disturbance, (5) hearing impairment, (6) mental retardation, (7) multiple disabilities, (8) orthopedic impairment, (9) other health impairment (includes ADD, ADHD, epilepsy, etc.), (10) specific learning disability, (11) speech or language impairment, (12) traumatic brain injury, and/or (13) visual impairment including blindness. IDEIA 2004 provides legal definitions of the above-listed disabilities, which may differ from those terms used in medical or clinical practice or daily language. The second step in determining eligibility for special education and related services is a finding by the school's multi-disciplinary team (MDT) that the student with one or more of these disabilities is in need of specially-designed instruction.

What Parents Can Do If They Think Their Child May Qualify for Special Education

Parents who think their child is eligible for special education may request, at any time, that the school conduct a multi-disciplinary evaluation. Some potential signs of a student having a qualifying disability include experiencing years of difficulties in reading, writing or solving math problems, difficulties focusing and concentrating on schoolwork, difficulties sitting still in the

classroom, and difficulties controlling emotions (such as anxiety and depression) and/or behaviors. Requests for a multi-disciplinary evaluation must be made in writing to the school's Assistant Principal of Special Education. If a parent makes an oral request for a multi-disciplinary evaluation, the school shall provide the parent with a form for that purpose. If the school denies the parents' request for an evaluation, the parents have the right to challenge the denial through an impartial hearing or through voluntary alternative dispute resolution such as mediation.

Mastery Charter School's Systematic Screening and Referral Processes

Through our systematic screening and referral processes, Mastery Charter School identifies and refers for evaluation students who are thought to be eligible for special education services.

These screening and referral processes include the initial admissions academic placement tests, standardized reading and mathematics assessments, classroom performance, benchmark examinations, vision and hearing screenings, and the comprehensive student assistance program known as C-SAP. The school regularly assesses the current achievement and performance of the child, designs school-based interventions, and assesses the effectiveness of interventions. The screening of a student by a teacher or specialist to determine appropriate instructional strategies for curriculum implementation is not to be considered an evaluation for eligibility for special education and related services. If a concern can be addressed without special education services, or if the concern is the result of limited English proficiency or the lack of appropriate instruction, a recommendation may be made for interventions other than a multi-disciplinary team evaluation.

Parents have the right to request a multidisciplinary team evaluation at any time, regardless of the outcome of the screening process. Moreover, screening or pre-referral intervention activities may not serve as a bar to the right of a parent to request an evaluation, at any time, including prior to or during the conduct of screening or pre-referral intervention activities. If parents need additional information regarding the purpose, time, and location of screening activities, they should call or write the school's Assistant Principal of Special Education.

Evaluation

Whenever a student is referred for a multi-disciplinary team evaluation, Mastery Charter School must obtain written consent from a parent before the evaluation can be conducted. Parental consent for an evaluation shall not be construed as consent for their child to receive special education and/or related services. In certain circumstances, a surrogate parent may be appointed. A surrogate parent must be appointed when no parent can be identified; a public agency, after reasonable efforts, cannot locate a parent; the child is a ward of the State under the laws of Pennsylvania or the child is an unaccompanied homeless youth. The surrogate parent may represent the child in all matters relating to the identification, evaluation, and educational placement of the child. Reasonable efforts must be made to ensure the assignment of surrogate parent not more than 30 days after it is determined that the child needs a surrogate parent. Under IDEIA 2004, an evaluation involves the use of a variety of assessment tools and strategies to gather relevant functional, developmental, and academic information about the child, including information provided by the parent that may assist in determining whether the child is a child with a disability and assist in determining the content of the child's IEP. This process is conducted by a Multi-Disciplinary Team (MDT) which includes a teacher, other

qualified professionals who work with the child, the parents and other members as required by law. The multi-disciplinary team evaluation process must be conducted in accordance with specific timelines and must include protection-in-evaluation procedures. Mastery Charter School does not use any single measure or assessment as a sole criterion for determining whether a child is a child with a disability and for determining an appropriate educational program for the child. Technically sound instruments are used to assess the relative contribution of cognitive and behavioral factors in addition to physical or developmental factors.

The results of the multi-disciplinary evaluation are written in a report called an Evaluation Report (ER). This report makes recommendations about a student's eligibility for special education based on the presence of a disability and the need for specially designed instruction. If the student's Multi-Disciplinary Team determines that the student is eligible for special education and related services, then a detailed plan for supporting the student in his/her area(s) of need over the coming year is written. This plan is called an Individualized Education Plan or IEP and is written so that the child can be successful in school—and then later in life.

Programs and Services for Children with Disabilities

Mastery Charter School, in conjunction with the parents, determines the type and intensity of special education and related services that a particular child needs based exclusively on the unique program of special education and related services that the school develops for that child. This program is called an Individualized Education Plan—the IEP—and is different for each student. An IEP Team consists of educators, parents, and other persons with special expertise or familiarity with the child. The participants in the IEP Team are dictated by IDEIA 2004.

The parents of the child have the right to be notified of and to be offered participation in all meetings of their child's IEP Team. The IEP is revised as often as circumstances warrant but reviewed at least annually. The law requires that the program and placement of the child, as described in the IEP, be reasonably calculated to ensure meaningful educational benefit to the student. In accordance with IDEIA 2004, there may be situations in which the school may hold an IEP team meeting if the parents refuse or fail to attend the IEP team meeting.

IEPs generally contain: (1) a statement of present levels of academic achievement and functional performance; (2) a statement of measurable annual goals established for the child; (3) a statement of how the child's progress toward meeting the annual goals will be measured and when periodic reports will be provided; (4) a statement of the special education and related services and supplementary aids and services and a statement of the program modifications or supports for school personnel that will be provided, if any; (5) an explanation of the extent, if any, to which the child will not participate with non-disabled children in the regular class and in activities; (6) a statement of any individual appropriate accommodations that are necessary to measure the academic achievement and functional performance of the child on State and school assessments; and (7) the projected date for the beginning of the services and modifications and the anticipated frequency, location and duration of those services or modifications.

Special education services are provided according to the educational needs of the child, not the category of disability. Types of service that may be available, depending upon the child's disability and needs include, but are not limited to: (1) learning support; (2) life skills support; (3) emotional support; (4) deaf or hearing impaired support; (5) blind or visually impaired support; (6) physical support; (7) autistic support; and (8) multiple disabilities support.

Related services are designed to enable the child to participate in or access his or her program of special education. Examples of related services that a child may require include but are not limited to: speech and language therapy, transportation, occupational therapy, physical therapy, school nursing services, audiologist services, counseling, or training. Related services, including psychological counseling, are provided at no cost to parents.

Mastery Charter School ensures that children with disabilities are educated to the maximum extent possible in the regular education environment or "least restrictive environment". To the maximum extent appropriate, students with disabilities are educated with students who are not disabled. Special classes, separate schooling or other removal of students with disabilities from the general educational environment occurs only when the nature or severity of the disability is such that education in general education classes, even with the use of supplementary aids and services cannot be achieved satisfactorily. Programs and services available to students with disabilities, might include: (1) regular class placement with supplementary aides and services provided as needed in that environment; (2) regular class placement for most of the school day with itinerant service by a special education teacher either in or out of the regular classroom; (3) regular class placement for most of the school day with instruction provided by a special education teacher in a resource classroom; (4) part-time special education class placement in a regular public school or alternative setting; and (5) special education class placement or special education services provided outside the regular class for most or all of the school day, either in a regular public school or alternative setting, such as an approved private school or other private facility licensed to serve children with disabilities.

Some students may also be eligible for extended school year services if determined needed by their IEP teams in accordance with Chapter 711 regulations.

Beginning not later than the first IEP to be in effect when the child turns 14, or younger if determined appropriate by the IEP Team, and updated annually, thereafter, the IEP must include appropriate measurable postsecondary goals and transition services needed to assist in reaching those goals. Mastery Charter School must invite the child to the IEP team meeting at which the transition plan is developed.

Beginning not later than one year before the child reaches the age of 21, which is the age of majority for education purposes under Pennsylvania law, the IEP must include a statement that the student has been informed of the student's rights, if any, that will transfer to the student on reaching the age of 21.

Services for Protected Handicapped Students, Other Than Special Education Services

Under Section 504 of the Federal Rehabilitation Act of 1973, some school age children with disabilities who do not meet the eligibility criteria outlined above might nevertheless be eligible for special protections and for adaptations and accommodations in instruction, facilities, and activities. Children are entitled to such protections, adaptations, and accommodations if they have a mental or physical disability that substantially limits or prohibits participation in or access to an aspect of the school program and otherwise qualify under the applicable laws. Mastery Charter School must ensure that qualified handicapped students have equal opportunity to participate in the school program and activities to the maximum extent appropriate for each individual student. In compliance with applicable state and federal laws, Mastery Charter School provides to each qualifying protected handicapped student without discrimination or cost to the student or family, those related aids, services or accommodations which are needed to provide equal opportunity to participate in and obtain the benefits of the school program and

extracurricular activities to the maximum extent appropriate to the student's abilities and to the extent required by these laws.

These services and protections for "protected handicapped students" may be distinct from those applicable to eligible or thought-to-be eligible students. Mastery Charter School or the parent may initiate an evaluation if they believe a student is a protected handicapped student. For further information on the evaluation procedures and provision of services to protected handicapped students, parents should contact the school's Assistant Principal of Special Education.

Confidentiality of Student Information

Every effort is made throughout the screening, referral and evaluation process to strictly maintain the confidentiality of student information and protect the students' privacy rights. The student C-SAP referral process is a strictly confidential process.

After a referral and evaluation is conducted, a written record of the evaluation results is generated. This is called an Evaluation Report. This report may include information regarding the student's physical, mental, emotional, and health functioning through testing and assessment, observation of the student, as well as a review of any records made available to Mastery through the student's physician and other providers of services, such as counselors. Moreover, the evaluation report contains "personally identifiable information" of the student. *Personally identifiable information* includes the child's name, the name of the child's parents or other family member, and a list of characteristics that would make the child's identify easily traceable. Input from parents is also an information source for identification.

Mastery Charter School protects the confidentiality of *personally identifiable information* by one school official being responsible for ensuring the confidentiality of the records, training being

provided to all persons using the information, and maintaining for public inspection a current list of employees' names and positions who have had access to the information. Mastery will inform parents when this information is no longer needed to provide educational services to a student and will destroy the information at the request of the parent. However, general information, such as the student's name, address, phone number, grades, attendance record, classes attended, and grade level completed may be maintained without time limitation.

Parents of students with disabilities have a number of rights regarding the confidentiality of their child's records. The right to inspect and review any educational records related to their child that are collected, maintained, or used by the school. Mastery will comply with a request from parents to review the records without unnecessary delay and before any meeting regarding planning for the child's special education program (called an IEP meeting), and before a hearing should the parents and Mastery Charter School disagree about how to educate the child who needs special education and, in no case, take more than 45 days to furnish parents with the opportunity to inspect and review the child's records.

Parents have the right to an explanation and interpretations of the records, to be provided copies of the records if failure to provide the copies would effectively prevent parents from exercising their right to inspect and review the records, and the right to have a representative inspect and review the records.

Upon request, Mastery Charter School will provide parents with a list of the types and the location of education records collected, maintained, or used by the school. Parents have the right to request amendment of their child's education records that they believe are inaccurate or misleading, or violate the privacy or other rights of the child. Mastery Charter will decide whether to amend the records within a reasonable time of receipt of the parents' request. If

school administrators refuse to amend the records, parents will be notified of the refusal and your right to a hearing. At that time, parents will be given, additional information regarding the hearing procedures and, upon request, Mastery will provide parents with a records hearing to challenge information in the child's educational files.

Parent consent is required before *personally identifiable information* contained in the child's education records is disclosed to anyone other than officials of Mastery collecting or using the information for purposes of identification of the child, locating the child and evaluating the child or for any other purpose of making available a free appropriate public education to the child. A school official has a legitimate educational interest if the official needs to review an education record in order to fulfill his/her professional responsibility. Additionally, Mastery Charter School, upon request, discloses records without consent to officials of another school district or charter school in which the child seeks or intends to enroll.

When a child reaches age 18, the rights of the parent with regard to confidentiality of *personally identifiable information* are transferred to the student.

If parents need additional information regarding the Mastery Charter School's policy on educational records and confidentiality, they should call or write the school's Assistant Principal of Operations. A parent may file a written complaint alleging that the rights described in this notice were not provided. The complaint should be addressed to:

Pennsylvania Department of Education
Bureau of Special Education
Division of Compliance 333 Market Street
Harrisburg, PA 17126-0333

The Department of Education will investigate the matter and issue a report of findings and necessary corrective action within 60 days. The Department will take necessary action to ensure compliance is achieved.

Complaints alleging failures of Mastery Charter School with regard to confidentiality of *personally identifiable information* may also be filed with:

Family Policy Compliance Office

U.S. Department of Education 400 Maryland Avenue, SW

Washington, D.C. 20202-4605

CERTIFICATION REGARDING LOBBYING

Certification for Contracts, Grants, Loans, and Cooperative Agreements

The undersigned certifies, to the best of his or her knowledge and belief, that:

(1) No Federal appropriated funds have been paid or will be paid, by or on behalf of the undersigned, to any person for influencing or attempting to influence an officer or employee of an agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with the awarding of any Federal contract, the making of any Federal grant, the making of any Federal loan, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment, or modification of any Federal contract, grant, loan, or cooperative agreement.

(2) If any funds other than Federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this Federal contract, grant, loan, or cooperative agreement, the undersigned shall complete and submit Standard Form-LLL, "Disclosure of Lobbying Activities," in accordance with its instructions.

(3) The undersigned shall require that the language of this certification be included in the award documents for all subawards at all tiers (including subcontracts, subgrants, and contracts under grants, loans, and cooperative agreements) and that all subrecipients shall certify and disclose accordingly. This certification is a material representation of fact upon which reliance was placed when this transaction was made or entered into. Submission of this certification is a prerequisite for making or entering into this transaction imposed by section 1352, title 31, U.S. Code. Any person who fails to file the required certification shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.

Statement for Loan Guarantees and Loan Insurance

The undersigned states, to the best of his or her knowledge and belief, that:

If any funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this commitment providing for the United States to insure or guarantee a loan, the undersigned shall complete and submit Standard Form-LLL, "Disclosure of Lobbying Activities," in accordance with its instructions. Submission of this statement is a prerequisite for making or entering into this transaction imposed by section 1352, title 31, U.S. Code. Any person who fails to file the required statement shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.

* APPLICANT'S ORGANIZATION <input style="width: 90%;" type="text" value="Mastery Charter High School"/>	
* PRINTED NAME AND TITLE OF AUTHORIZED REPRESENTATIVE	
Prefix: <input style="width: 100px;" type="text"/>	* First Name: <input style="width: 250px;" type="text" value="Scott"/> Middle Name: <input style="width: 180px;" type="text"/>
* Last Name: <input style="width: 320px;" type="text" value="Gordon"/>	Suffix: <input style="width: 100px;" type="text"/>
* Title: <input style="width: 320px;" type="text" value="Chief Executive Officer"/>	
* SIGNATURE: <input style="width: 350px;" type="text" value="Natalie Lucas"/>	* DATE: <input style="width: 180px;" type="text" value="07/15/2016"/>

Abstract

The abstract narrative must not exceed one page and should use language that will be understood by a range of audiences. For all projects, include the project title (if applicable), goals, expected outcomes and contributions for research, policy, practice, etc. Include population to be served, as appropriate. For research applications, also include the following:

- Theoretical and conceptual background of the study (i.e., prior research that this investigation builds upon and that provides a compelling rationale for this study)
- Research issues, hypotheses and questions being addressed
- Study design including a brief description of the sample including sample size, methods, principals dependent, independent, and control variables, and the approach to data analysis.

[Note: For a non-electronic submission, include the name and address of your organization and the name, phone number and e-mail address of the contact person for this project.]

You may now Close the Form

You have attached 1 file to this page, no more files may be added. To add a different file, you must first delete the existing file.

* Attachment:

TIF5MasteryAbstract.pdf

Add Attachment

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View Attachment

TIF 5 Application

Mastery Charter Schools: Abstract

Mastery Charter Schools proposes the **Mastery 3.0 Opportunity Culture Human Capital Management System Redesign Project (MOCHCS)** to address the Absolute Priority of the TIF 5 competition, **An LEA-wide Human Capital Management System with Educator Evaluation and Support Systems at the Center**, **Competitive Priority 2: Improving Teacher Effectiveness and Promoting Equitable Access to Effective Educators**, and **Invitational Priority: Promoting Equitable Access through State Plans to Ensure Equitable Access to Excellent Educators**. The lead applicant is Mastery Charter High School, a nonprofit organization, with 15 LEAs as partners (totaling 27 schools serving 13,000 K-12 students). In Philadelphia, PA, each of the following schools is its own LEA: Mastery Charter High School, Mastery Charter School Thomas Campus, Mastery Charter School Shoemaker Campus, Mastery Charter School Pickett Campus, Mastery Charter School Harrity Elementary, Mastery Charter School Mann Elementary, Mastery Charter School Smedley Elementary, Mastery Charter School Clymer, Hardy Williams Academy Charter School, Mastery Charter School Gratz, Mastery Charter School Cleveland Elementary, Francis D. Pastorius Mastery Charter School, Frederick Douglass Mastery Charter School, and Mastery Charter School John Wister Campus. In Camden, NJ, the LEA is Mastery Schools of Camden, Inc., consisting of six schools. All of these schools are considered high-need schools and all will be served by the proposed TIF-funded performance-based compensation system.

The project aims to redesign Mastery's Human Capital Management System to provide world class programs, supports, and performance compensation systems that improve educator effectiveness and increase student achievement at Mastery's high need schools. MOCHCS will be deployed through four core areas: Talent Pipeline Development, Talent Management Systems and Data Analytics, Educator Development, and Performance Based Compensation Systems.

Project Narrative File(s)

* Mandatory Project Narrative File Filename:

To add more Project Narrative File attachments, please use the attachment buttons below.

Mastery Charter Schools Teacher Incentive Fund 5 Proposal

“Mastery 3.0 Opportunity Culture Human Capital Management System Redesign Project”

PROJECT NARRATIVE

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*And pages 17-19 in Project Design under “Educator Development”	
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ADEQUACY OF RESOURCES	Pages 37-40

I. TIF 5 PRIORITIES AND REQUIREMENTS

Mastery Charter Schools (Mastery) proposes to address the Absolute Priority of the Teacher Incentive Fund 5 (TIF 5) grant competition through the **Mastery 3.0 Opportunity Culture Human Capital Management System Redesign Project** (MOCHCS) described in this application.

ABSOLUTE PRIORITY and REQUIREMENTS 1 & 2:

An LEA-wide Human Capital Management System (HCMS) with Educator Evaluation and Support Systems at the Center.

Requirement 1: Implementation of Performance Based Compensation Systems

Requirement 2: Documentation of High-Need Schools

Status: MET

Please see the Application Requirements Checklist in Appendix A for evidence of where in the narrative we meet the Absolute Priority and Requirement 1; and Appendix B for the High-Need School Eligibility Checklist for Requirement 2.

COMPETITIVE PRIORITY #2: Improving Teacher Effectiveness and Promoting Equitable Access to Effective Educators and Invitational Priority: Promoting Equitable Access through State Plans to Ensure Equitable Access to Excellent Educators

Status: MET

Mastery wholeheartedly supports the Department's commitment to equity in **Competitive Priority 2: Improving Teacher Effectiveness and Promoting Equitable Access**

to Effective Educators, and our proposed project continues one of our organization’s core focuses – ensuring that children from low-income families and minority backgrounds have effective teachers. Mastery serves a predominantly low-income, minority demographic, as is clear from the Mastery High Need Schools list in Appendix F, page 1. Our primary purpose is turning around failing schools in low-income communities and in any discussions around new potential schools, our principle is to not seek any schools where the low-income student population is lower than 60%. Additionally, since most of our schools are turnarounds of a struggling district’s schools (Philadelphia or Camden), we tend to be located in and serve communities that have historically been and continue to be racially isolated and economically distraught. The student population for each turnaround remains the same as it was under district management, as we prioritize welcoming all children from the neighborhood in student recruitment and enrollment.

It is well-documented that there is inequity in the quality of teachers that students from low-income and minority backgrounds have when compared with their peers. They are taught by teachers who are lower in quality and more likely to be uncertified, to have scored poorly on required exams, and teaching out-of-field than teachers serving a students from a wealthier, lower-minority demographic.¹ Numerous studies point to the shortcomings of the typical teaching staff for the low-income, minority students like the students that Mastery serves, including the greater likelihood that effective teachers leave,² and that they are teaching subjects for which they are unprepared³ This disparity occurs within districts, and even within individual schools; at Mastery, because of the demographic data of our student body, the full student body

¹ Jerald., C.D. (2009)

² (Goldhaber et al., (2009)

³ *U.S. Department of Education (2007*

represents this exact population that is usually subjected to low-quality teachers. Thus, our current efforts as an organization and our proposed enhancements as described in this proposal to dramatically strengthen teacher quality are ultimately geared at increasing the teacher effectiveness for students who traditionally would suffer from this inequity – all of our student population. Our Project Design section dives deeply into the myriad ways we are now and propose to increase access to high quality teachers.

Our efforts also address the **Invitational Priority: Promoting Equitable Access through State Plans to Ensure Equitable Access to Excellent Educators** by aligning to the state plans in Pennsylvania and New Jersey that seek to rectify the inequity. Our project’s activities are in line with the actions that the New Jersey state plan proposes (NJ Department of Education, 2015), such as improving human capital data quality and structures to better understand teacher effectiveness and make better human capital decisions. As addressed in Core Focus Area #2: Talent Management Systems and Data Analytics on pages 14-16 and through Core Focus Area #1: Talent Pipeline Development on pages 9-13, we are aligned to the NJ plan’s focus on improving the preparation of novice teachers. Our project proposes many activities aligned to those proposed in the Pennsylvania state plan (Pennsylvania Department of Education, 2015), too, specifically improving communications and marketing for recruiting new educators; coordinating with local teacher preparation programs and providing field placements; developing leaders through RELAY NPAF and an internal Apprentice Leader program; improving analysis of human capital data; and providing robust, ongoing professional development in Mathematics and ELA.

II. SELECTION CRITERIA

A. SIGNIFICANCE (20 points)

In determining the significance of the proposed project, the Secretary considers the extent to which the proposed project is likely to build local capacity to provide, improve, or expand services that address the needs of the target population.

Mastery Schools Network (Mastery) is applying for a TIF grant as a network of LEAs with Mastery Charter High School as the lead applicant. Mastery has been operating charter schools in PA and NJ since 2001 and now serves more than 13,000 students K-12 across 15 LEAs with 100% of our 26 schools meeting the definition of “high-need” (as seen in Appendix F). Mastery’s area of expertise is turning around formerly failing public schools. Of the 26 schools we currently operate, 20 are turnarounds of district or charter schools that were in the bottom 10% by performance statewide prior to Mastery turnaround. A recent national study on school turnaround models conducted by the Parthenon Group in 2014 found that **Mastery has experienced the strongest growth in proficiency rates for students in reading and math from year one to year five in turnarounds than any other operator of multiple turnarounds in the country** (Parthenon Group, February 2014)⁴. After turnaround we continue to operate those schools as the neighborhood public schools, making Mastery as close a proxy to urban public districts in the charter sector. In fact, each year educators from more than 50 different charter networks and public school districts visit Mastery, attend our “Teacher Effectiveness Institutes” and seek to learn what we do in the areas of school turnaround, educator effectiveness, performance pay, and student achievement. We believe our unique role as neighborhood charter schools in the education landscape makes the work we propose to do with human capital management under TIF meet all of the requirements under the Significance section of this application. As the largest charter network in both the state of Pennsylvania and the city of Philadelphia and the largest Renaissance Charter operator in Camden, NJ we have a direct ability to *build local educator capacity* to provide higher quality academic programs and

⁴The Parthenon Group. (2014, February) Mapping the Landscape of School Turnaround Models. Research report prepared for the Dell Foundation.

outcomes for low-income, minority students in these two urban centers. We will this by directly impacting more than 1,600 educators and 13,000+ high need (low income and/or minority) students served under this grant proposal and indirectly by continuing to play our natural role sharing and training on aspects of our model that work to improve teacher quality and student outcomes.

While our vision and both our current HCMS and our plans for redesign in this application are firmly aligned with Mastery's vision for instructional improvement, it is important to provide some context regarding changes that are in process across the Mastery network at present. After 13 years as a network, we found that after early gains in turnaround schools, our student outcomes were stagnating in mature schools and at the postsecondary level. After intense evaluation of student outcomes and the impact of our prior instructional model, Mastery introduced and implemented "Mastery 3.0" in fall 2014 as a shift in our core school model intended to increase student success. The model makes three significant shifts in our instructional model: *(1) From direct instruction toward a best practice constructivist influenced model; (2) from "No Excuses"/Compliance Focus to a Restorative, Culturally Responsive approach; and (3) from intense scaffolding for students to raising the bar by increasing rigor, shifting the cognitive load more squarely onto students, providing ways to struggle and fail, and increasing our ability to provide responsive individualization at the student level.* As seen in the 3.0 overview slides in Appendix F, we require major investments in teacher and leader supports and higher quality instruction to implement the model in full.

Both philosophically and practically, Mastery believes that we exist not just to run good schools but to impact access to high quality schools for students in the communities we serve. In May 2016, following two years of initial Mastery 3.0 implementation and a yearlong input

process with teachers, leaders, and parents, the Mastery network of schools approved a new five year strategic plan taking us into 2021 (the same time period as the proposed grant). our board chose a clear path to **“Focus on Systems Change in Philadelphia and Camden to change the education system for *all* kids in the cities we serve.”** That bold direction means that while we are focused on building world class human capital systems inside Mastery, it is our intent to be able to share what we build and learn with other educators and to help make Philadelphia and Camden an attractive hub for high quality educators to come, teach, lead, and stay.

Undergirding our path, are four functional priorities that will drive the work of the organization over the next five years. The top two functional priorities in the plan are to “prove out Mastery 3.0 instructional model” and to “build organizational systems for scale” (see Appendix F for more on the priorities). To prove out our 3.0 instructional model we need to focus squarely on dramatically improving academic outcomes for students in all our participating schools based on major investments in teachers and leaders as drivers of these outcomes.

Mastery has a track record of securing grant funds, scaling new programs, using funds wisely and ensuring we create open source access to our model and programs for other districts and networks. We received a TIF 3 grant in 2010 to focus on development and implementation of our PBCS system at that time - to codify TAS, bring it to full sustainability, and to launch our PBCS for school leaders – the Mastery Management Model (M3) – by working through a cross-school design team process. By the end of TIF 3, 100% of Mastery schools open more than one year had a fully sustained financial structure for supporting PBCS and were implementing the model and 100% of the programmatic elements introduced under the grant were continued after the grant. In this grant proposal we fully fund all of the PBCS payouts to educators in existing schools through non-federal funds as our continued commitment to sustainability. Overall, we

are contributing more than 50% of the funds needed to implement the project we describe and our TIF 5 proposal strengthens PBCS and will support human capital capacity that will enable us to dramatically impact thousands of educators and tens of thousands of the high need students they serve over the next five years.

B. QUALITY OF THE PROJECT DESIGN (45 points)

(1) The extent to which the proposed project is part of a comprehensive effort to improve teaching and learning and support rigorous academic standards for students;

Mastery Charter Schools (Mastery) proposes to refine and improve our existing Human Capital Management System, which uses evaluation and educator support systems to drive decision-making across our network of public charter schools in Philadelphia, PA, and Camden, NJ through the **Mastery 3.0 High Quality Human Capital Management System Redesign Project** described in this application. Mastery currently has the needed infrastructure and basic systems in place on which to build a world-class Human Capital Management System (HCMS) over the next five years with the support of the Teacher Incentive Fund. Human capital decisions are currently driven collaboratively between school leadership teams and the Network Support Team (NST). The NST serves as a lean central office which provides human-capital focused services to all the 15 current LEAs included in this proposal. Human capital decisions at the school level are supported by a clear set of policies and procedures and by NST teams that provide services to schools in the areas of recruitment and hiring, talent management, professional development for teachers and leaders, data collection and analytics, performance compensation, retention, and promotion. All Mastery schools follow a common instructional program that is aligned to the Common Core State Standards (CCSS) and developed by the NST staff with significant site-based teacher and leader design and implementation input. Direct educator supports are then designed and provided by a combination of school and NST-based

staff to individual educators, role-aligned peers, and school-wide. Accountability for all human capital supports in school is held jointly by the school Principal and the Regional Schools Officer supervising each school.

Mastery has long believed that for student outcomes to increase, the organization must fully align every aspect of operation to how it will impact student achievement. An effective HCMS is critical to student outcomes at Mastery as every stage of the process – from recruitment and hiring to professional development to compensation and retention – is firmly believed to have a direct impact on how students learn and achieve each day in the classroom. As shown in Exhibit B.1 below, Mastery believes in a “straight line” approach to aligning expectations in the classroom with how we train and support teachers resulting in higher student outcomes and pay for performance. These tenets are currently a part of the Mastery model. While we believe that this basic framework is still the right path to student achievement, our theory of change under TIF is that the way we operationalize our human capital systems at each stage in the model can be dramatically improved resulting in more evidence based human capital practices driving breakthrough student outcomes.

Exhibit B.1: Mastery Comprehensive Approach to Developing a World Class Workforce



The Human Capital System improvements and additions we propose under TIF are fully aligned to Mastery’s comprehensive efforts under our 3.0 instructional shifts as an organization dramatically improve teaching and learning in our schools supporting high need students.

This shift for Mastery to 3.0 as described in the Significance section requires a different way of teaching, a deeper understanding of cultural context in the classrooms and communities we serve, and for teachers and school leaders to truly become content experts in their fields. Everything points to more skilled educators in our schools – at a time when quality educators are increasingly difficult to hire and retain in low-income, urban schools.

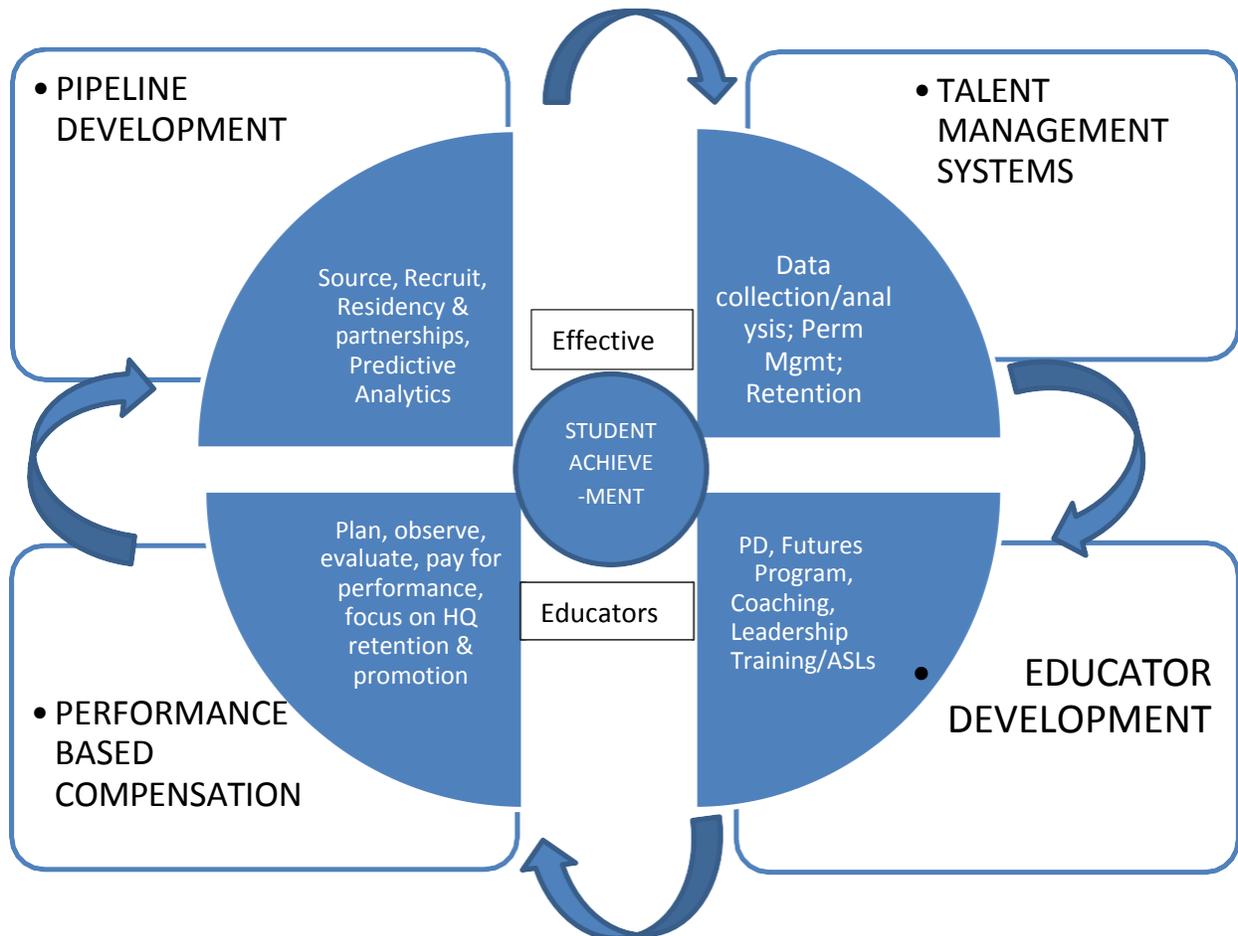
The **Mastery 3.0 Opportunity Culture Human Capital Management System Redesign Project (MOCHCS)** consists of four core focus areas of work that both make up and impact the human capital continuum in Mastery schools aligned to who we are becoming as a network of urban schools, ultimately moving the needle on student achievement and growth. These core areas are aligned to the flow of the MOCHCS cycle as seen in Exhibit B.2 with the first three: Talent Pipeline Development, Talent Management Systems, and Educator Development all culminating in a more effective Performance Based Compensation System (core focus area #4) for all educators at Mastery.

Core Focus Area #1: Talent Pipeline Development

This core area focuses on identifying talent and creating high quality pipelines to ensure the highest quality educators in classrooms and leading our schools each year. In the human capital management system lifecycle, this is the entry point for talent. While we focus much of our energy on developing educators once they are here, we believe one of the highest impact areas would be to increase the quality of the talent pool we attract and hire so we can start further along the continuum of teacher quality. While Mastery currently has a small recruitment team – 1 manager level staff person per 100+ openings -- hiring approximately 300 staff each year, research provided by the Charter School Growth Fund on seven similarly-sized large CMOs noted that the average peer organization had between 10-16 recruitment staff to fill this many

positions each year. In addition, we have low-technology candidate sourcing and tracking tools (e.g. spreadsheets) for a network of our size and we lack consistent, quality predictive analytics based on data from historical hiring and retention. As we grow larger, we find it harder to find and hire a diverse teaching corps with experience in the classroom and to keep up with pipeline data tracking. While we are proud of what we have been able to do on the recruitment and placement end in spite of these challenges, we know we need to build those systems to continue to have the capacity to hire at this rate and to increase the quality of our new hires as our network continues to grow. Through our core focus on Pipeline Development, we will seek to implement the following initiatives under TIF:

Exhibit B.2: Mastery 3.0 Human Capital Management System Process Flow



a) *Create signature Pipeline Development programs through teacher residencies in hard to fill subjects & pre-placement partnerships with area colleges:* We propose investing in two programs to grow our own pipeline of talent under TIF. First, we would like to invest in expanding a pilot program we have started with RELAY Graduate School of Education by creating Teacher Residencies in secondary math and special education, with a focus on a diverse candidate pool. We piloted the program only in K-2 literacy in 2015-16 with 15 candidates, including 75% candidates of color. We had a 92% success rate converting residents into full time teachers for the coming fall and RELAY residents are averaging 1.4 years of academic growth in one year with the students they supported. Under TIF we would pilot, test, evaluate and scale a secondary residency into a sustainable part of our secondary school model. Second, we would to build formal partnerships with several area colleges to become placement sites for student teachers and to create formal pre-placement programs to encourage placement at Mastery after graduation.

b) *Add targeted capacity to the talent team*– Recruiting higher quality teachers and leaders is a tenant of the Opportunity Culture theory⁵ that is at the core of our project and we recognize we need more people and more specialized staff to do this work. Mastery’s current recruitment team is undersized for the number of hires we make each year. Our top three recruiting priorities under TIF will be increasing quality leadership hires, teacher recruiting in hard to fill subjects, and school support/leadership roles focused on supporting teachers. Our proposal includes adding staff on a temporary basis to build capacity on the recruitment team in these three priority hiring areas under TIF, as described in the Budget Narrative.

c) *Data analytics to use talent life cycle data to create predictive models for hiring* - Mastery’s recruitment, data, and academic teams have been informally tracking the factors that may predict

⁵ Hassel, BC & Hassel, E.A. (2010)

success for newly hired teachers at Mastery. Using rich data we will be able to track and collect through our proposed Talent Management Systems (see pages 14-16) developed under TIF, we will have a seamless way to track data from candidate stage through to promotion or exit and build a profile of what candidate characteristics lead to better outcomes (retention and student achievement). While this effort is in its infancy, early results have shown that by looking at certain factors such as educational attainment, years of experience, diversity, colleges and graduate schools attended, key coursework taken in college, etc. can suggest a profile or set of pre-entry profiles that are a more likely fit for Mastery schools. For candidates who do not meet the first tier of quality under the recruitment analytics, we will also be able to use the data systems to determine what interventions matter most in terms of having an impact on types of candidates (e.g. does content coaching have the greatest impact on first year teachers' ability to drive student growth?). This can expand our target pool as we will be able to immediately slate new staff into the types of supports that have greatest likelihood of making them effective in delivering student outcomes.. Mastery would also be able to build a similar tool for school leadership positions and both would then inform our Educator Development efforts described later in the narrative.

d) Strategic communications effort to increase our reach in the market - Mastery has not invested in strategic communications to increase our leverage in the marketplace and our brand recognition is lower than smaller networks in our region. We have had some early success with short-term efforts to use social media to target and attract quality talent. Under TIF we would make a small investment in a rebrand on the talent side and use social media and strategic partnerships to extend our access and reach with teaching and leadership candidates.

e) Building incentive programs targeted at hard to fill positions - All of Mastery's teaching positions could be considered hard-to-fill since 100% of our schools are high-need urban schools and 75% are in a turnaround school environment. Compounded with our expansion to opening new schools each year, the recruitment team faces many challenges when filling open positions of any kind and is most similar to large urban districts in terms of our ability to attract and retain all staff to our high need schools and to fill hard to staff subjects as evidenced by several studies, including one on other TIF grantees.⁶ Within our network, we can prioritize the hardest to fill positions where we struggle to find and keep high quality candidates: a) Secondary special education; b) Secondary Mathematics (grades 6-12); c) Chemistry; d) Physics; e) Secondary Spanish; and f) Upper Elementary Math or Reading (grades 5-8). While some of these areas have been hard to staff for years, secondary mathematics has grown as a challenge for us since we changed to a more rigorous College Preparatory Mathematics (CPM) curriculum in grades 6-12 under our Mastery 3.0 shift. The content knowledge and classroom facilitation skills required by this model mandate highly skilled mathematics faculty. In addition, the entering skill level of our students tends to be low – creating a desperate need for excellent math faculty.

We would like to create an incentive program for these hard to staff positions at the marketing and sourcing stage of recruitment. We have begun research on best practices in the use of fiscal and other incentives, including the size of wage premiums needed to attract top faculty in these areas⁷ and would like to spend a research and development window for part of year 1 of TIF prior to launching pilot incentive programs in spring 2017. We will track data in each pilot and use both internal data and review from our external evaluator to determine which

⁶ Glazerman & Max (2011); Rivkin, Hanushek, and Kain (2005); Olden, A. & Wallace, M. (2007)

⁷ Glazerman, et. al. (2013)

programs provide the highest leverage as incentives to attract and retain quality faculty in these areas.

For school leadership, our needs vary by year and we have no incentive system as part of the recruitment process. Leaders are often relocating (about 35% of leaders who come to Mastery come from another region) and feedback from leaders we have lost frequently notes incentives from other districts as being factors in their departure. We propose a similar cycle of research, pilot phase, evaluation, and permanent phase-in of incentives for high quality leaders in school based roles.

Core Focus Area #2: Talent Management Systems (TMS) and Data Analytics

As Mastery has grown to 26 schools, 13,000 students, and 1,600 employees - and as we continue to grow each year - we need a more sophisticated set of data tools driving our HCMS. A broad range of research on talent in the education sector points to a need to harness human capital data to make talent management a proactive strategy for aligning talent to outcomes and that we cannot truly provide effective teachers in every classroom until we understand and use our human capital data in strategic ways.⁸ In fact research also suggests that it is too common in schools to use lagging indicators (test scores, retention rates) to make decisions because school systems lack coherent human capital data to make informed decisions about how to drive toward the outcomes they want. Our TIF proposal seeks to solve this problem. In this section we will refer to the data systems and tools driving the MOCHCS as the “Talent Management Systems” or TMS. This will be the foundation needed to drive a more precise and useful Performance Based Compensation System (PBCS) as detailed in Core Focus Area #4 on pages 19-28.

⁸ Starner, T. (2016); The New Teacher Project (2015)

Our TMS encompasses all data systems and tools needed to drive information and data-based decisions about human capital across the network. Mastery currently uses a patchwork of different purchased and self-created systems to create what should be – but in practice is not – a seamless system of employee identification, PBCS-capable payroll systems, recruitment and retention data, performance management, and talent tracking systems. In addition we have a separate system for linking student academic outcomes to teachers and school leaders that does not connect with other parts of our TMS. Under TIF, we intend to implement a new TMS that will launch in phases and ultimately be able to provide all Mastery schools with a comprehensive set of web-based tools to manage the full life cycle in our Human Capital Management System.

We propose to create a three-year process with both internal staff and external contractors to identify the appropriate tools, customize them to Mastery’s Human Capital Management needs and our performance based pay system requirements, pilot the tools, and then launch and train all teachers and leaders on use of the system. The data tracked and analyzed through the TMS will be able to impact our HCMS lifecycle in the following ways:

- Recruitment – providing a sourcing and tracking tool to feed into our Pipeline development initiatives via data for predictive analytics
- Talent Development and Management – data tracked and analyzed related to PD and leadership opportunities and their impact on teacher quality/student outcomes. This will also allow us to identify succession planning in schools for Master teachers and leaders and provide valuable data on retention efforts.
- Performance Based Compensation – the TMS will allow us to systematize the current paperwork-heavy systems of teacher and leader observation, feedback and evaluation. The new TMS will allow our Human Capital team to use the data collected from our evaluation system to

more accurately design supports and drive hiring, retention, performance pay, promotion, and recruitment decisions on a macro scale.

The TMS implementation will follow a 30-month schedule with three phases:

(1) Pre-Implementation: Vendor and Tool Selection: Internal implementation team creates RFP for data system vendors, begins process of specialization through development of business rules and process requirements to meet our Human Capital Management System needs.

(2) Phase I implementation: Internal team works with selected vendor on build out and launch of the TMS implementation to streamline employee data collection and analysis

(3) Phase II Implementation: Launch recruitment/sourcing data tools, full talent management suite for tracking educator training and support inputs, promotion trajectory, student outcomes linked to educators, and connection with evaluation and compensation.

At full implementation, the new TMS will allow Mastery schools to be able to identify staffing and personnel trends and needs in schools and across the network in real time. The system would also support improved recruitment, professional development, and retention efforts by giving us clearer pictures of both individual and collective characteristics of Mastery staff and their skill gaps or strengths and to be able to both program for that and to have faculty seek development opportunities based on needs. A critical use of the new TMS would be the ability to even better understand individual educators' impact on student achievement to help with placement and retention – particularly in hard to staff schools and subjects.

Core Focus #3: Educator Development

As part of our overall Human Capital Management System we believe that supporting our educators to become high quality teachers and leaders is at the core of what we do [See Appendix F for sample training schedules). Mastery has always had a deep investment in

teacher professional development. Our schools have early release time every Wednesday for schools to provide on-site PD, we use three weeks each summer to train teachers and leaders, and we have a robust approach to teacher and principal coaching as part of our current model. In Core Focus #3 our target is on further improving instructional quality in high need schools by improving the quality of the teachers and leaders in our system. Based on current pilots in Mastery schools, our review of effective educator development programming in other districts, and the 2015 TNTP study recommendations for teacher development that works,⁹ we will make investments in four key initiatives under Educator Development through TIF: **(1) Formal Teacher Leader Program “Mastery Futures”; (2) Master Teacher Collaborative, (3) Apprentice School Leaders; and 4) Content Coaching in Hard to Staff/Low Outcome Areas.**

(1) Formal Teacher Leader Program: Mastery Futures: One area where Mastery struggles to retain high quality teachers is when they are seeking the next step in their career and there is no logical step. Each year we lose approximately 65% of quality teachers who apply to be Assistant Principals but then seek opportunities elsewhere because there are not enough positions available, we find they are not ready to lead in our system and we do not have clear pathways toward an AP position. Feedback from our teachers resulted in our proposal to develop a formal FUTURES program: a cohort-model development program with formal training on the skills needed for leadership and the support of a mentor. Starting with a research and design phase, we would seek feedback from eligible teachers and review best practices in teacher leader programs to build the curriculum and to balance the preparation of teachers to rise into leadership over time while serving in beneficial ways as teacher leaders without leaving the classroom full time. For example, they could receive training on how to run a planning meeting or how to observe a

⁹ TNTP “The Mirage” 2015

teacher and give feedback, then try it onsite, allowing them to gain instructional leadership skills without having to exit the classroom. FUTURES would give options to exemplary teachers to expand their skills, feel valued, and still directly work with students while learning new skills.

(2) Master Teacher Opportunity Culture Collaborative: A high priority in Opportunity Culture is in finding ways to keep Master teachers engaged in the classroom full time to both impact more students and to train the next generation of teachers (retention and reach extension). Under TIF we will work with a collaborative our of best Master teachers – ones for whom our MVAS data is consistently exceptional in student growth and achievement – to design a model where we blend higher pay, increased student loads, and the support of junior teachers as both a retention and leadership development opportunity for our best teachers This approach would result in more students being taught by high quality teacher provide a development pathway for junior teachers.

(3) Apprentice School Leaders (ASLs): Mastery has hosted an ASL experience for more than five years. This is intended to be a full-time training year prior to becoming a principal or assistant principal. ASLs are teachers who are intentionally released for a leadership training year. While a good concept in theory, the practice has not led to enough return on our human capital investments due to several factors. First, due to the high level of need in our schools and our recent growth trajectory, no one ASL experience is the same and many ASLs are pressed into service in schools in full time roles prior to the year ending. In other cases, principals do not take ownership of training their site-based ASLs since they do not control their future placement – so they are not willing to make the investment in talent they will likely lose. Finally, there is no structured learning experience for the ASLs with a common rubric for what should be mastered during the year, common training, and metrics for success. We intend to use some TIF

funds to reimagine our ASL program to address these gaps, formalize the expectations and experience for ASLs, and make it a more viable leadership support and training program for aspiring leaders.

Content Coaching in Hard to Staff/Low Outcome Areas – The final programmatic focus under Educator Development is also connected to the concept of educational equity and having high quality teachers in every classroom – particularly those that are traditionally hard to staff or where we have had traditionally weak student outcomes. On page 13 we identified several areas that are hard to staff. In addition, our state testing and nationally normed reference test data since our two states have shifted to Common Core show weaknesses in some hard to staff subjects (6-12 math, Physics, Chemistry) and foundational literacy and math skills in K-2. Under the Mastery 3.0 shift and our recent reorganization with the new strategic plan at Mastery, we are investing in Content Coaching at schools as a way to support teachers and instructional leaders in improving instructional quality in their content area. Under TIF we will expand investments in several of these challenge areas with additional content coaches and evaluate if their direct teacher supports have a differentiated impact on teacher quality in the PBCS and on student outcomes.

Core Focus #4: Revise and Strengthen Mastery’s Performance Based Compensation Systems (PBCS) for Teachers and Leaders

Mastery currently implements a Performance Based Compensation System (PBCS) that includes all teachers, principals and other school leaders across our system. Per the federal guidance, our current system meets 100% of the requirements for a PBCS. We use a Teacher Advancement System (TAS) for teachers and the Mastery Management Model (M3) for leaders and will refer to these collectively as our PBCS throughout the narrative. *We are not seeking TIF grant*

support to create a PBCS, but rather to make significant improvements to the sustainable incentive compensation model that exists at the core of our overall Human Capital Management System. PBCS is the capstone of our Human Capital Management system and we believe the changes made in core focus areas 1-3 as well as some dramatic redesign of our current PBCS will lead to both a world class approach to Human Capital at Mastery and help us instill the Opportunity Culture we are seeking to build.

History of PBCS at Mastery: A “step” pay system or automatic bonus system does not exist in Mastery schools. Instead, we operate performance-based compensation systems (PBCS) for teachers and leaders at school sites resulting in increased compensation the following year. The origin of Mastery’s PBCS was a pilot of our Teacher Advancement System (TAS) that began in 2008 when we were just one school and was fully implemented under TIF 3 to the sustainable system it is today. Mastery’s TAS and M3 systems are unique to Mastery and have evolved over time. Our Human Capital Management System at Mastery has therefore had educator evaluation at the core for more than six years and we have a philosophical and practical orientation to performance compensation as a foundational activity as a network of schools. As we have grown, we have made modifications to the PBCS; however, we are at a point where we need to shift from simply having a PBCS to a redesign aligned to our Mastery 3.0 instructional shift and our strategic focus on developing an Opportunity Culture with human capital. This proposal will describe how TAS and M3 currently work and what fundamental redesign principles we intend to employ under TIF to ensure that the PBCS at the core of our organization actually delivers on its promise – being a key lever to improving instructional quality, equitable access to high quality educators for students, and student achievement. Please note that in our redesign efforts we are contributing more than 90% of the costs of PBCS incentives from Mastery funds under

the project as we have a sustainability mechanism for these payouts for all but our newest schools in their first year of operation under PBCS.

PBCS for Teachers: Teacher Advancement System (TAS): Mastery believes in the use of a 100% performance based pay system for teachers as a way to attract, support, and retain the highest quality teachers – since we know that the top driver of student achievement is access to a high quality teacher. Teachers and school leaders play an important part in the design, feedback, and implementation of the system in our culture of transparency and fairness. At present the system has **four teacher categories** (Associate, Sr. Assoc., Advanced, Master) each with a specific advancement criteria, performance expectation, and salary range. The four components that currently drive performance expectations and determine a teacher’s category are Student Achievement (with 45% weight, the most valuable), Instructional Effectiveness (35%), Values and Contribution (10%), and Student Perception (10%). While we briefly describe each of the three performance categories here, detailed information on the TAS is included in Appendix F.

Student Achievement –our PBCS places the highest priority on student outcomes. While absolute measures such as pass rates and test scores are important, we believe that measures of growth are equally or more valuable when evaluating teacher performance. Mastery’s Value Added System (MVAS), our signature data system that we developed under TIF 3, compiles all prior performance data on individual students. See Appendix F for sample annotated reports from MVAS and how it works in PBCS for teachers by grade and subject. The inputs for MVAS include the prior two benchmark exams, benchmarks from complimentary subjects, 4Sight exams (PA), NRT data (ACT/Aspire/MAP or TerraNova) from the previous year, and special education status. These results are used to create teacher value add ratings on a 1-5 scale each quarter. A sample quarterly MVAS report in Appendix F demonstrates the wealth of

information available in the MVAS report and information on the performance rating scale for teachers in the system. The predictive models have proven to be both accurate and stable over time and meet established standards for reliability.

MVAS data is used in Mastery schools starting in their second year of operation. Where MVAS is not available alternate metrics exist. A chart of the student achievement measures by grade and subject using MVAS or other measures is included in Appendix F.

Instructional Effectiveness: At 35% of the current TAS score, the measure of teaching quality is based on teachers' implementation of the Instructional Standards [see Appendix F] which create a common definition of instructional quality at Mastery and are the basis of our instructional model. These are currently assessed by a series of short (10-20 minutes) and frequent (4 or more in each of 3 observation windows) classroom observations each year. The current observation and feedback cycle is described in Appendix F. After each observation window, teachers receive one summative rating that aligns to performance expectations.

Values and Contribution: The third criterion in TAS helps Mastery schools maintain a strong focus on values alignment at the teacher and leader level. We believe that in order to achieve our ambitious mission, all staff must uphold the Mastery Values (Detail in Appendix F).

Student Perception: This criterion was just introduced to the TAS in the 2015-2016 school year as part of our alignment with Mastery 3.0. It follows research related to the Mastery 3.0 principle of "Build Mindset" that substantiates research showing student mindset as a predictor of student learning. This criterion is assessed through student surveys conducted in grades 3-12 at Mid-Year and End-of-Year. The surveys (Sample in Appendix F) were designed to be quick and easy to complete, and to give actionable information about how teachers are impacting

mindset growth. We see strong positive correlations between positive responses to the student survey questions and student growth (correlations by subject between the student survey and growth as measured by value add metrics averaged 0.45).

Role of Formal Evaluation in PBCS: The Mid-Year Review and End-of-Year Review serve as structured time for supervisors to provide feedback and for teachers to learn about their performance. The current Mid-Year review is a developmental conversation and highlights areas of success and needs for improvement. Based on the four performance criteria and a teacher's current category, we statistically create a rating to place each teacher along the salary continuum in PBCS. During the End-of-Year review all four areas of TAS are discussed, ratings are shared, and teachers receive their resulting performance category rating and salary for the next school year.

While all teachers participate in our PBCS, we consider “high quality” teachers to be those placed in the highest two categories or who receive a promotion via evaluation. All teachers who are renewed receive some form of performance compensation and all incentive compensation is in the form of a higher salary increment the following year (vs. one time bonuses).

TAS Redesign under TIF: Our focus under TIF for redesigning teacher-level performance based pay will focus on two elements: (a) systematizing the observation and evaluation process for equity and impact under the PBCS, and (b) utilizing the proposed Talent Management System to better use and manage educator data to inform the PBCS.

(a) **Systematizing Observation and Evaluation under PBCS:** As the center of our Human Capital Management System, our ability to make sure teacher observation and evaluation lead to predictable outcomes for teachers in PBCS is key. Our twice-annual INSIGHT teacher survey

data (sample section in Appendix F) reveals growing teachers support for PBCS over time, but where still fewer than half (48% in 2016) of teachers agree that: “At my school, evaluation ratings are accurate reflections of teacher effectiveness.” We need to do much more to create a more reliable system for teachers to truly feel the PBCS is a driver of teacher behavior and student outcomes, and a true measure of their impact. While MVAS and other systems make quantitative PBCS decisions possible, at present school leaders still have discretion to adjust payouts up or down based on qualitative factors. This leads to variation in performance comp across campuses and lack of trust in the system by teachers. We need to systematize the process so leaders trust and implement the ratings for equity in the system to occur.

Both teachers and leaders also complain about the cumbersome process currently in place. Our TIF redesign would seek to address these issues. Our second TAS redesign element would focus on changing the way we conduct our observation and feedback cycle. The TIF project would allow us a design window with a task force of teachers and leaders to examine the weaknesses of the observation/evaluation cycle, propose changes, pilot changes, and implement a revised system. Through this process we would also create more consistent guidelines across schools for norming ratings, incentive compensation ranges, off boarding, and improvement plan decisions so evidence, rationale, and decisions are aligned. Finally, under the systematization effort we will also look at our formula under PBCS to determine if we have the correct mix of factors and weighting to properly drive student outcomes and teacher quality.

(b) Utilizing the proposed Talent Management System to better use and manage educator data to inform the PBCS: First, we would streamline the process using the new Talent Management System (TMS) to have more reliable data on all elements of the PBCS so teachers report being more confident in the alignment between performance, evaluation and pay. The new TMS will

allow us to provide a much richer set of current and historical data from multiple sources to inform all four criteria of the TAS ratings along with comparison data sets for similar educators across the network. We will be able to create a much richer and more reliable set of recommendations for performance based compensation and continue to address the teacher buy in for the PBCS and our external evaluator will add another layer of validation for the project.

PBCS for Leaders: Mastery Management Model (M3): The PBCS for Mastery's school leaders is called the Mastery Management Model, or M3. Like for teachers with TAS, M3 uses performance rather than seniority to drive performance expectations and determines performance category, advancement, and compensation for this group of staff. M3 has three performance categories (Senior, Advanced, and Master) and three sets of performance criteria (Student Outcomes, Management Standards, and Mastery Values/Contributions – described briefly below and provided in detail in Appendix F).

Outcomes -- These are role-specific, expected results which are tied to an individual's job responsibilities and the Annual Goals for the school (Sample in Appendix F).

Management Standards - The Management Standards are a set of skills and competencies that Mastery school leaders need to be effective. (See Appendix F).

Mastery Values – This portion of M3 is conducted in the same manner as it is for Teachers under TAS.

As a newer system, Mastery plans to fully develop and validate the performance category metrics for M3 performance as part of the TIF 5 effort. Mid Year and End of Year outcomes for staff under M3 for performance compensation decisions follow the same rubric outlined for teachers under TAS (Appendix F).

M3 Redesign under TIF –

M3 is a newer addition to the PBCS environment at Mastery and is in need of more dramatic improvement to play the role we intended: to accurately incent and reward high quality leaders based on outcomes. Our current M3 system is a solid starting point for the basis of our evaluation, support, and compensation decisions for school leaders, but there is much room for growth. Mastery plans to move M3 to a place of comparable maturity and effectiveness that TAS has achieved. We have three areas of program focus in the TIF Redesign of M3: (a) Systematize the performance categories and expectations; (b) Clearly define the Management Standards and create Goal Setting protocols, training, and tracking; and (c) Include a developmental review process in evaluation.

(a) Systematization of M3: The leadership evaluation system under PBCS does not include any weighting system for performance metrics, so this leaves a lot to subjective weighting at the supervisor level. If student achievement is our top priority, we need to determine how the outcomes section of the evaluation weighs in on performance compensation decisions with consistency. One current project that should support the early Systematization of M3 and our ability to more clearly link leadership compensation to student outcomes is our shift in 2016-17 to convert the old Mission Metrics framework (all school wide goals) into two sets of metrics: Annual Goals related to academic outcomes (standardized tests, Fountas & Pinnell, and the ACT) and a school dashboard on non-instructional measures such as student retention, family engagement, etc. The purpose of dividing school leaders' goals into two groups is to intensely focus their attention on the academic measures as the active targets each year. The school dashboard are also important but can be considered more like "maintenance requirements" that a leader is held accountable for and alerts are triggered when any of these non-academic areas fall below the bar and require attention. The annual goals format will keep Principals focused on

student academic achievement as top priority. Proposed Annual Goals and dashboard documents are in Appendix F for review. This shift in accountability will enhance the amount of information a school leader has about their school to take action and aligns with our proposal to introduce a new TMS.

(b) Redefine the Management Standards and Goal Setting Expectations: The Management Standards (Appendix F), while best practice concepts from the fields of effective management in organizations have not been operationalized for school leaders so that we can set SMART consistent goals in each area. This leads to much subjectivity in the goal setting and evaluation in this area. As M3 was created in in 2013 under TIF3, our external evaluator WestEd noted that a next step would be to codify and validate the management standards so they can serve as a clearer proxy for leader quality under a system revision. We must better define these standards, what effectiveness looks like in each, and what are relevant categories of goals to set in each based on a leader's role in a school. Leadership training for leaders at all performance categories related to Management Standards can then be built out around the framework we develop to define success.

(c) Developmental Reviews: We would also like to increase our M3 staff's capability and accountability in goal setting and provide an avenue for self-evaluation to factor into the process. A realistic self-evaluation component (e.g. 360-degree reviews) will become possible after implementation of the new TMS.

Teacher and Leader Input on PBCS Redesign: We have a history of utilizing a cycle of task forces and focus groups, design review teams, pilot phases, and formal roll out of our PBCS. Teachers and leaders were involved in the early design of TAS and M3 and have been engaged more recently with major redesign. For example, when we began to consider a student rating

component in teacher evaluation, we not only looked at research based tools for using student evaluation, but we sought teacher feedback through focus groups early on to look at the proposed tools, talk through the pros and cons of student input. We also ran large scale feedback loops after our initial pilots with student ratings to understand how to best use the data in evaluations and communicate that with teachers. We believe in an iterative process to implementing changes in our network, in particular ones that impact our most important drivers of student achievement: teachers.

For the TIF redesign of our PBCS at Mastery, we will create an interdisciplinary committee of teachers, school leaders, and NST leaders who engage in Human Capital to look at the current systems for TAS and M3, dive into our current teacher and leader feedback data in Insight, and conduct additional focus groups, input sessions, and targeted surveys as needed beyond Insight. As part of the committee, we will schedule regular sessions with only teacher participants to ensure teacher input can have a clear place both inside the interdisciplinary team and as a priority subgroup of the committee.

(2) The extent to which the services to be provided by the proposed project involve the collaboration of appropriate partners for maximizing the effectiveness of project services;

The group of Mastery Charter Schools applying as a consortium of 15 LEAs under TIF is all connected through a common management organization – Mastery Charter High School – also the lead applicant for the grant. We have attached signed management agreements between MCHS and each of the LEAs in this application (Appendix F) as evidence of formal collaboration. Since we already share a common management organization, school model, curriculum, data systems, and common Human Capital Management System we are well-suited to work together on the TIF project plans. In our Management Plan and Budget narrative, we

provide greater detail in individual members of the NST and school based teams who will play roles in planning and implementation of the various project components. We have also noted the creation of a specific TIF Interdisciplinary Human Capital Team (TIHCT) that will be comprised of teachers, school leaders, and NST leaders to provide input on all aspects of design and implementation during the life of the grant and to green light various task forces, focus groups, and additional survey requests as needed for implementation of our HCMS improvements. We consider the 15-member LEAs in this proposal the formal partners and any external capacity added via contracts (TMS vendor, RELAY, external evaluation) will play a supportive role.

(3) The extent to which the proposed project is supported by a strong theory;

Mastery's approach to our Human Capital Management System is based on both research and practical experience running high need, urban schools over 15 years. As an overall frame, we have been influenced by Public Impact's "Opportunity Culture" research (2010) about the mix of Human Capital strategies needed to be able to dramatically increase the number of students who are taught by a high quality teacher. Their premise is that single initiatives cannot solve the teacher quality puzzle and that a combination of "high-performer reach extension, recruitment, and retention, coupled with low performer dismissal" (Hassel & Hassel, 2010, p. 5) can triple the number of students engaging with high quality teachers each year. Our proposal is built on a foundation of focus on this Opportunity Culture philosophy and includes a fifth element by layering in high quality professional development for teachers to dramatically improve the effectiveness of our educators and the outcomes of the students they serve. School leaders also fit into our Opportunity Culture frame as research confirms to the strong impact of a high quality principal on student achievement. Branch, Hanushek, & Rivkin (2013) found that the impact of a high quality principal adds between 2 and 7 years of student learning each year while a low

quality principal has the opposite effect. In addition, the ability of quality school leaders to be able to impact Opportunity Culture by being better at retaining quality teachers, removing low performers, and better developing teachers (Branch, et. al., 2013) further reinforces our decision to simultaneously focus on both teacher and school leader quality. We have taken this theoretical lens of Opportunity Culture and have built our four core focus areas for redesign, revision, or creation under the TIF project in alignment with this research. For each area in the narrative, there are also key pieces of research pointing to why we decided to invest in specific programs such as teacher residencies or Performance Based Compensation and we have cited some of those studies throughout. Our logic model is aligned to our strong theory and our bibliography includes the research and theory influencing our proposal.

(4) The extent to which the proposed project will integrate with or build on similar or related efforts to improve the relevant outcomes (as defined in 34 C.F.R. 77.1(c)), using existing funding streams from other programs or policies supported by community, State and Federal resources.

As described throughout the Project Design section, Mastery already has a firm foundation in place to be able to refine our HCMS to impact educator effectiveness and student achievement using strong theory to support our proposed efforts. The proposed project is fully aligned to the organizational Strategic Plan our Board approved in May 2016 and as evidenced by our budget proposal and will supplement fiscal resources we already intend to spend on these efforts. In particular, the sustainability of our PBCS is so critical to our model, that we are only seeking a small fraction of the total cost of PBCS payouts to teachers and leaders in any year of the grant. The majority of our leveraged funding streams come from basic operating dollars, however, we also intend to leverage some funds from private funders (William Penn Foundation, Philadelphia Schools Partnership, Charter School Growth Fund) where applicable as part of our non-federal contribution to the project.

C. PROFESSIONAL DEVELOPMENT SYSTEMS TO SUPPORT THE NEEDS OF TEACHERS AND PRINCIPALS IDENTIFIED THROUGH THE EVALUATION PROCESS (15 points)

Mastery has a long history of valuing professional development (PD) and teacher supports in our schools. 100% of our schools are considered “high need” and with a large number of new educators, we have consistently chosen to invest in developing talent through PD aligned to our curricular model and vision for increasing student achievement. An example of the continuum of PD supports we currently offer include: (a) time in the school day for common planning time for teachers, (b) weekly PD release time for teachers at the school level, (c) monthly network-wide PD for role-alike educators, (d) quarterly data days to review student, classroom and school level data and design focus plans for the coming quarter, (e.) four weeks of content training options for leaders in the summer, (f) three weeks of summer teacher training, (f) targeted teacher coaching, and (g) an array of optional training from SEED training to Wilson Reading training based on the educator and their interest and need. We have attached our annual PD calendar and summer training calendar in Appendix F as evidence of our commitment to consistent, high quality PD for educators across our network.

The beauty of our System Redesign Project is that we can continue our current focus on PD, implement the four core programmatic additions to our Educator Development model described on pages 17-19 of this narrative, and much more effectively mine disaggregated data from the educator Evaluation and Support systems through our proposed Talent Management System to impact teacher effectiveness. We will have a full lifecycle of data to better target PD. So in our current system where we can use MVAS data to target skill development for teachers by content area, we will now be able to overlay MVAS data with PD participation data, observation feedback and evaluation ratings in one place to better tailor supports to each

educator. At present we do use our MVAS data at the student, classroom and school level to plan each quarter, determine what to reteach or where to focus next, and to create interventions for students through RTII. The addition of a comprehensive TMS that includes observation, evaluation, and educator support data is in great demand by our network of more than 1,600 educators who are already accustomed to using data to drive both teacher and leader learning and student achievement.

As a part of the HCMS revisions proposed in our project, we would also build a professional development matrix from pre-hiring to “master” level for teachers and leaders to better organize our PD offerings and target them to the right educators. We have many useful options for teachers and leaders, but we need to give some attention to describing what we offer so that staff understand what each option delivers, the requirements for each one, and whether or not it is a fit for them. Using the new TMS, we will also be able to gauge the impact of some strands of PD so we can leverage what works and discontinue less effective modules. The matrix will not only provide a needed skeleton behind our PD offerings at Mastery, it will also support the development of required competencies and training sequences for several programs proposed in this application.

Alongside the matrix, Mastery will develop more concrete processes around assigning and tracking participation in professional development. Not only could supervisors or NST leaders quickly identify supports for individual teachers, teachers could also seek out supports based on their self-identified skill gaps.

D. QUALITY OF THE MANAGEMENT PLAN (15 points)

In determining the quality of the management plan for the proposed project, the Secretary considers the adequacy of the management plan to achieve the objectives of the proposed project on time and within budget, including clearly defined responsibilities, timelines, and milestones for accomplishing project tasks.

Mastery Charter Schools are committed to strengthening our Human Capital Management System with educator evaluation and supports at the center. We have not designed the programmatic elements detailed here in order to win a grant, but because we believe it is the most effective way to attract, grow, and retain the highest quality faculty and staff who can achieve optimal results with students. We have piloted and modified our teacher pay for performance model over the past several years at our current schools and have internal survey and focus group evidence from teachers and leaders regarding where we need to go to increase the validity and usefulness of our Performance Compensation systems. We are also committed to sustainability (see Budget Narrative) and you will find that our fiscal requests under TIF are for capacity building to improve our HCMS and PBCS, not to provide a temporary funding stream for our incentive compensation system. In Exhibit 4.1 our project goal with project objectives, measures, and deadlines are included along with key project implementation milestones, timelines, and project owners.

We also have a solid team currently at Mastery with a long track record of successful federal and state grant implementation, including staff with direct experience managing successful TIF grants. Resumes of our project team including some key job descriptions for key, new roles are attached in Appendix D. Key project leaders include:

PROJECT DIRECTOR: Our Project Director, Courtney Collins-Shapiro, is Mastery's Chief Innovation Officer. She has spent much of her most recent 12 years in public education managing more than \$60 million in federal competitive grants from USDOE and has previously served as a successful PD for a TIF3 grant. She will focus on grant compliance as the PD part of her time with the CTO in the Program Director role full time.

CTO – this will be a new role at Mastery created to spearhead all efforts related to Human Capital Management (JD in Appendix). The role will serve as the Program Director for the grant 100% time and will be responsible for full implementation efforts across the grant with a day to day focus on the Talent Management System build out and Performance Compensation revision components of the grant.

CEO, Scott Gordon, founded Mastery in 2011. He firmly believes in the value of PBCS and played a key role in shaping the new strategic plan for Mastery where we are laser-focused on internal student academic achievement and improving teacher/leader quality over the next five years.

Deputy Chief Data Management – Peter Lee has been with Mastery for 5 years and has 20 years of experience in data analytics and system design. He has led full-scale systems implementations, created our MVAS data tool, and has a background in both predictive hiring analytics and performance compensation system analytics that are key to implementation of our proposal.

Chief Schools Officer, Jeff Pestrak, is a secondary science teacher by origin and has served as AP, Principal, CAO, and now CSO over 11 years at Mastery. He has primary responsibility for principal supervision and student outcomes and directly informs our human capital decisions.

CAO, Molly Eigen, Mastery's Chief Academic Officer responsible for all educator development programming at the network. Content Coaches under TIF will report to her team and will advise on PD matrix development and the content/outcome of proposed pipeline programs under TIF.

Additional leadership roles created under the grant are described in the budget narrative and job descriptions are included in the resumes attachment, where applicable. We believe that between the current staff in place at Mastery who have helped create our current HCMS, those on our team now who have helped with the creation of this proposal, and key staff we will add through the TIF grant to focus on the new project work, we have the experience and track record to successfully accomplish our project goals on time and within budget.

EXHIBIT 4.1 – MOCHCS Timelines and Milestones

Project Goal: To redesign our Human Capital Management System using an Opportunity Culture lens to provide world class programs, supports, and performance compensation systems that improve educator effectiveness and increase student achievement.

Project Objective #1: Increase student achievement

Performance Measure (& type)	PERFORMANCE MEASURE/ OUTCOME Description (Responsible party)	Deadline
Project PM 1.1	75% of schools will increase by 4 or more points on their percentage of state proficiency (Chief Schools Officer - CSO)	August of each year

Project Objective #2: Increase educator quality and retention

GPRA PM 2.1	Percentage of educators (teachers & leaders) in all schools who earned performance-based compensation will exceed 72% over the life of the grant (Chief Talent Officer - CTO)	July each year
GPRA PM 2.2	Percentage of educators in all High-Need Schools who earned performance-based compensation <i>**This is the same as 2.1 as all Mastery schools are high need</i> (CTO)	July each year
GPRA PM 2.3	The percentage of teachers and principals who receive the highest effectiveness rating will increase each year during the grant from baseline (8.6% teachers, 16% principals) (CTO)	August each year
GPRA PM 2.4	The percentage of teachers and principals in High-Need Schools who receive the highest effectiveness rating (CTO) – <i>same as PM 2.3 all schools are high need</i>	August each year (same as 2.4)
Project PM 2.5	The percentage of <i>new teachers</i> who Score 3 or higher on MVAS during year one of employment at Mastery will exceed 50% in Year one, will make 1.5-2 points of growth each year to increase to 60% by year 5 of the grant (CSO)	July each year
Project PM 2.6	The percentage of the overall teaching corps scoring a 4 or 5 on MVAS (CSO) will exceed 15% in year one and will increase by 1-2 points per year to reach 22% by year 5 of the grant	July each year
Project PM 2.8	Percentage overall of teachers retained or promoted each year will exceed the national average of 76% each year of the grant (CSO & CTO)	September each year

OTHER GPRA MEASURES

GPRA #5	The number of school districts (LEAs) participating in a TIF grant that use educator evaluation systems to inform the following human capital decisions: recruitment, hiring, placement, retention, dismissal, professional development, tenure, promotion, or all of the above = 100% of all LEAs in the grant (Project Director)	October 2016
GPRA #6	The percentage of performance-based compensation paid to educators with State, local, or other non-TIF federal resources will be 90% or greater each year (CFO, CTO, Project Director)	August each year
GPRA #7	The gap between the retention rate of educators receiving performance-based compensation and the average retention rate in each High-Need School will be determined in year 1 and we will set annual targets for decreasing the gap with our Program Officer at that time (CTO)	July each year

Mastery-HCMS KEY PROJECT MILESTONES RELATED TO CORE AREAS

CORE AREA	Project Milestone	Responsible Party <i>(Project Director oversight for all initiatives)</i>	Deadline
ALL	Hire all TIF project staff by on time per the budget narrative	CTO (Program Director)	August 2017 or see budget narr.
PBCS	Establish Interdisciplinary TIF Work Team (teachers, leaders, NST)	CTO (Program Director)	November 2016
	Design and begin implementation of TALENT PIPELINE programs (Teacher Residency, Summer Fellows & Pre-Placement)	CTO, Residency Director, Pipeline Partnerships Director	12/17 Design 8/18 Implemented
PIPELINE	Early Phase Recruitment & Retention Incentive Programs for Teachers and Leaders launched	CTO, TIF Recruitment Team	March 2017
EDUCATOR DEV.	Design and begin implementation of all new EDUCATOR DEVELOPMENT initiatives (Content coaching, FUTURES, ASLs)	RSO for ASLs, Futures Director,	
	Select partner for Talent Management System build out	Deputy Chief of Data Management (DCDM)	June 2017
TMS	Full implementation of Phase 1 and Phase II of new TMS	CTO & DCDM	Phase I –6/30/18, Phase 2 6/30/19

PBCS	Teacher Advancement (PBCS) overhaul complete and implemented	CTO & Interdisciplinary TIF PBCS team	August 2018
PBCS	Mastery Management Model (M3) overhaul complete and implemented	CTO & Interdisciplinary TIF PBCS team	August 2018
	Evaluation Report on of Effectiveness of TIF Program Components	CTO & Evaluator	Every September during the grant

E. ADEQUACY OF RESOURCES (5 points)

(1) The extent to which the applicant demonstrates that Performance-based Compensation Systems are developed with the input of teachers and school leaders in the schools and local educational agencies to be served by the grant.

In Section B on page 28 we describe the ways that teachers and leaders are involved in the design and refinement of the current PBCS. Since TIF will be an opportunity for a major overhaul of our performance compensation systems, we describe an interdisciplinary committee specifically for this work to drive educator input. Other examples of our continuing efforts to seek teacher and school leader input on the design and delivery of our PBCS include:

(1) Twice Annual Teacher Survey –INSIGHT Instructional Culture survey is a nationally normed teacher feedback survey given by The New Teacher Project to 100% of teachers at Mastery. Mastery began implementing the INSIGHT survey two years ago and we receive rich data about all aspects of our HCMS from the survey and are able to add customized questions to the original question bank as needed. There are 10 subsets of questions with four directly related to the work proposed in our application: Observation & Feedback, Evaluation, Professional Development and Retention. The report details for INSIGHT (too large to attach to this application) serve as evidence that teachers do indeed have formal, regular input on our human capital systems. We have no teacher union at Mastery so no one person can speak for our staff, so we must find myriad ways to engage faculty voice in valid, transparent

ways and share the results with them.

(2) Regular Feedback Loops – Throughout the year we have a number of measures for teachers to connect with members of the Talent team to weigh in on HCMS issues. Our CEO hosts at least 2 “teacher brown bags” at each school each year to hear from teachers about concerns and kudos, HR Managers schedule office hours regularly at campuses to meet with faculty regarding the observation and evaluation process, and teacher focus groups are regularly convened on issues related to contract changes or aspects of HR such as changes in the PBCS. Our most recent structured input action on PBCS was in fall 2014 when the Talent Team hosted six focus groups and conducted a survey regarding how the original three elements of PBCS were perceived by teachers (achievement, teacher effectiveness, values) and the pilot to introduce student feedback into evaluation. Teacher feedback directly accounted for some decisions regarding how to use student feedback in the evaluations, creation of a revised observation rubric aligned to the new Mastery 3.0 standards, and an 18-month focus on helping teachers better understand and use the MVAS data used in PBCS. Mastery is not a unionized environment so there is no formal teacher body to sign off on this application, however, we focus on making sure we take educator feedback into the decision making process and are quick to respond to teacher concerns.

School leaders have consistent engagement in decisions related to performance compensation. Principals and role-alike Assistant Principals meet every three weeks and have an opportunity to weigh in on any policy decisions that impact the network at that time. Their recent concerns regarding the cumbersome observation and evaluation process and how to streamline data capture and analysis has shaped parts of our Talent Management System and PBCS sections of this application. As with teachers, if there is a large decision to be made for

the network that would require a task force or focus groups, school leaders would always be formally engaged prior to any decision being made.

If we are awarded a TIF grant not only will we convene the interdisciplinary committed of teachers and leaders regarding the PBCS revisions, but we will also create a virtual newsletter to update faculty and staff about progress on the new TIF program and to see broader input on the TIF funded programs as they are designed and implemented.

(2) The extent to which the applicant demonstrates a plan to sustain financially the activities conducted and systems developed under the grant once the grant period has expired.

Mastery has been managing competitive federal grants for the last six years and is fully aware of the intent of grant funds to help build capacity and/or test the efficacy of new programs.

Sustainability of grant-funded program is always a part of our plan and the grant funded requests in this application fall into three categories to achieve this end:

(a) One-time investments – A number of the major initiatives like building out the Talent Management System or redesigning the PBCS model require temporary staffing or contract capacity to engage in building or design. The pursuant tools or systems are then left to be managed by existing staff under operating funds.

(b) Increases in staff capacity that can be absorbed in out years as the network size grows: Mastery has grown six-fold in the last five years. Our staffing model includes ramping up on programs early using fundraised dollars and “growing into” our size. For example, we need a functioning Apprentice School Leader program but do not have the resources to support a full time position. Grant funds support the role in the early years and by the end of the grant the organization has grown to a size where we can fund the position. This is a common funding structure in our growing organization and has helped us build successful programs and allowed us to sustain them over time. This model is also employed in our request for funds for PBCS

only at new schools where they have not built the resources to support incentive compensation. After year two, new schools have grown to scale and can afford the PBCS model going forward.

(c.) Using a pilot/evaluation model and keeping only what shows evidence of success or find ways to combine program management for cost savings: TIF will allow us to make and evaluate a number of investments in human capital over the next five years. While we are using a strong research base behind each initiative selected and we believe each will have an impact on improving teacher quality in our schools, in an era of sparse resources for public schools, we will likely have to make choices by year 4 about which programs to continue to scale and shift into the operating budget at schools and which are not impactful enough to maintain at scale. For example, if we determine that the Secondary Teacher Residency program is producing a large return on investment in securing quality teachers in high need subjects, but the college pre-placement program is not, we would find it to be a successful result of TIF to scale and sustain the former and discontinue the latter based on data. Another example is that in our budget we have TIF-funded leaders in the early years to support several pipeline programs with these roles shifting to half time in out years as part of the shift to sustainability. As the program design phase is complete and programs are mature, it is often possible for one staff member to do the work that two were needed to complete in the early years. Our budget and budget narrative provide details on our plan for sustainability in each program component of the grant and we view TIF resources as a large investment in capacity building.

Other Attachment File(s)

* Mandatory Other Attachment Filename:

To add more "Other Attachment" attachments, please use the attachment buttons below.

Appendix B: TIF Optional High- Need Schools Checklist

TIF OPTIONAL HIGH-NEED SCHOOL ELIGIBILITY CHECKLIST

Requirement 2--Documentation of High-Need Schools: Each applicant must demonstrate, in its application, that the schools participating in the implementation of the TIF-funded Performance-based Compensation Systems are High-Need Schools (as defined in this notice), including High-Poverty Schools, Priority Schools, or Persistently Lowest-Achieving Schools.

<p>(pg.) Appendix F, pp. 1-3</p> <p>D</p> <p>(pg.)</p>	<p>For determining the eligibility of a "high-need school," the Department is only aware of data regarding free and reduced price school lunches (FRPSL) as available to schools and LEAs.</p> <p>(a) A list of High-Need Schools in which the proposed TIF-supported Performance-based Compensation Systems would be implemented;</p> <p>AND</p> <p>(b) For each High-Poverty School listed, the most current data on the percentage of students who are eligible for free or reduced-price lunch subsidies under the Richard B. Russell National School Lunch Act or are considered students from low-income families based on another poverty measure that the LEA uses (see section 1113(a)(S) of the ESEA (20 U.S.C. 6313(a)(S))). Data provided to demonstrate eligibility as a High-Poverty School must be school-level data; the Department will not accept LEA- or State-level data for purposes of documenting whether a school is a High-Poverty School;</p> <p>AND</p>
<p>(pg.) Appendix F, pp. 1-3</p>	<p>(c) For any Priority Schools listed, documentation verifying that the State has received approval of a request for ESEA flexibility, and that the schools have been identified by the State as priority schools.</p>

Appendix C:

Logic Model

INPUTS

- TIF Funds
- Matching Funds
- Project Staff - Existing & New
- Management & Stakeholder Support
- Educator
- Mastery 3.0
- T & M3 systems
- Partnerships

ACTIVITIES

PIPELINE DEVELOPMENT

- Signature pipeline development programs
- Targeted capacity to recruitment team
- Predictive hiring model
- Strategic communication effort for recruitment branding and marketing
- Incentives for hard-to-fill positions

PERFORMANCE BASED COMPENSATION

- Systemized teacher observation & evaluation
- Improved data management
- Systemized M3 performance categories & expectations
- Clearly defined Management Standards and goal setting
- Leaders' developmental review via 360

TALENT MANAGEMENT SYSTEMS

- Comprehensive TMS
- Revised strategy around tracking human capital trends and needs

EDUCATOR DEVELOPMENT

- Enhanced and formalized professional development options
- Data to target professional development
- Mastery Futures program
- Master Teacher Opportunity Culture Collaborative
- Apprentice School Leaders program
- Content Coaching

OUTPUTS

- Teachers & leaders earning performance-based pay and being promoted
- Teachers & leaders achieving higher effectiveness ratings
- Teachers & leaders Mastery-ready through signature programs
- Larger pool of qualified candidates

OUTCOMES

Short-Term

Intermediate

Long-Term

- Teacher & leader skill development
- Teacher motivation to change instructional practice
- More efficient and accurate data analysis
 - Ready-available source of Mastery-ready educators

- Improved instructional practice
- Retention and attraction of high quality educators
- Shared concept of Mastery model and good teaching

- Improved student achievement

**MASTERY CHARTER SCHOOLS
TIF 5 LOGIC MODEL
Mastery 3.0 Opportunity Culture Human Capital
Management System Redesign Project**

ASSUMPTIONS

- All Mastery schools high-need schools
- Network growth over time
- Strategic plan priorities over the next 5 years

EXTERNAL FACTORS

- Regulations & certification policies
- Other Mastery programs
- Market conditions
- Resource levels

Appendix D: Resumes of Key Personnel

[REDACTED]

Dedicated educational entrepreneur with more than 17 years innovating in higher education, public K-12 and charter schools

PROFESSIONAL EXPERIENCE

MASTERY CHARTER SCHOOL NETWORK, Philadelphia, PA 5/2010 – present

Chief Innovation Officer 8/2012 – present

- Lead six functional teams (College Initiatives, Extracurricular Programs, Development and Grants, Communications, Strategic Partnerships, Parent and Community Engagement) in design and implementation of core functions supporting school expansion and student outcomes
- Oversee implementation of new initiatives such as alternative teacher and leader certification program creation and a full-time dual enrollment program for 12th grade students
- Serve as liaison to charter authorizer(s) – negotiating charter agreements, troubleshooting issues, and managing renewal processes
- Lead charter expansion efforts by securing new schools. Supported growth from 4 schools and 2,100 students to 12 schools and 9,500 students in three years, with plans for continued growth to 22 schools and 17,000 students.
- All functions of DCIO below

Deputy Chief Innovation Officer 5/2010-8/2012

- Develop and incubate new initiatives for multi-school charter school network
- Lead external affairs, including governance, marketing, communications, and board relations
- Direct Mastery’s fundraising efforts: Generated \$50 million in competitive private, federal, and state grant awards to support network expansion and core innovations
- Oversee Mastery’s relationship with all federal, state, and private funders, including accountability of Mastery staff and schools to funded outcomes

SCHOOL DISTRICT OF PHILADELPHIA, Philadelphia, PA 8/2003 – 5/2010

OFFICE OF MULTIPLE PATHWAYS TO GRADUATION 3/2006 – 5/2010

Founding Director

- Created and led new office which created the 2nd largest and most successful set of alternative schools for at-risk youth in the nation in less than three years
- Directed growth of program from \$8m to \$50m in annual operating and grant funds serving more than 20,000 students in grades 7-12 across including sixteen (16) accelerated high schools, eight (8) night schools, Gateway to College, the Literacy Bridge, and an Occupational Skills programs
- Supervise 12 professional staff and manage contracts with external providers for more than 200 school-based positions
- Serve as the District’s representative for the citywide Project U Turn Collaborative to identify key policy initiatives, seek legislative action on issues related to at-risk youth, and target funding opportunities for strategic investment between city, state, District, and private investors
- Design and implement the Student Success Center and Reengagement Center initiatives serving more than 14,000 youth annually and replicated nationally

PROFESSIONAL EXPERIENCE (continued)

OFFICE OF COLLEGE AND CAREER AWARENESS

8/2003 – 3/2006

Assistant Director

- Led creation of new Office of College and Career Awareness to design and implement district-wide programs and supports to increase postsecondary enrollment for 91,000 primarily low-income, minority, middle and high school public school students
- Supervised 12 professional staff and 10 graduate fellows
- Served as budget officer for new office and created program plans and accountability systems for annual allocation of \$15 million in operating and grant funds
- Designed new standards-based guidance curriculum for college guidance counselors

UNIVERSITY OF MARYLAND, College Park, MD

8/1997 – 8/2002

OFFICE OF CAMPUS PROGRAMS

Program Coordinator (Student Affairs)

7/1999 – 8/2002

Adjunct Faculty, College of Education

8/1997 – 8/2002

Housing Coordinator/Panhellenic Advisor

8/1997- 8/1999

UNIVERSITY OF PENNSYLVANIA, Philadelphia, PA

8/1996 – 7/1997

Graduate Assistant, Office of the Vice Provost for University Life

US HEALTHCARE, Blue Bell, PA

8/1994 – 10/1996

Sales and Marketing Representative

DELTA DELTA DELTA FRATERNITY, Arlington, TX

6/1993 – 7/1994

Field Consultant

EDUCATION

University of Maryland, College Park, MD

Doctor of Philosophy, Education Policy and Leadership

Coursework completed, Anticipated degree completion: December 2014

University of Pennsylvania, Philadelphia, PA

Master of Science in Higher Education Administration, June 1997

Villanova University, Villanova, PA

Bachelor of Arts, English, May 1993, *Cum Laude*



Job Description

Job Title:	Chief Talent Officer	Classification:	X Exempt/ Non Exempt
Reports to:	Chief Executive Officer	Salary Range:	Determined by Human Resources

Position Summary:

The Chief Talent Officer (CTO) oversees and provides best practice guidance in the following areas: employee relations, recruitment, performance management, training and development, benefits, compensation and organizational development. Reporting to the CEO, the CTO has two director-level reports (Director of Human Resources and the Director of Talent Recruitment) and manages a staff of 6 full-time and seasonal staff. The CTO will be a strategic partner to the academic and operational teams to ensure transparency and efficacy in policies and procedures around talent management and professional development.

The Chief Talent Officer is directly responsible for the strategic and tactical oversight of the talent management and acquisition teams at Mastery Charter Schools. Specifically, s/he will be responsible for developing and directing Mastery's talent towards measurable impact on overall student achievement.

Duties and Responsibilities:

- Design, implement and manage organizational development efforts to support Mastery in achieving its student achievement goals
- Collaborate with the Chief Executive Officer to develop strategic staffing plans for the organization
- Develop, oversee, and approve recruitment strategies for Mastery including strategic marketing and executive search firm management
- Create partnerships with mission-aligned education institutions and organizations to support Mastery's recruitment goals, including alternative and non-traditional programs
- Maintain current knowledge and understanding of innovative recruitment technologies
- Help establish new schools and train staff with respect to all HR related functions, policies, and procedures
- Develop, oversee and approve updates to organization-wide HR policies and procedures
- Participate in the hiring process of key positions: principals and central leadership
- Manage and enhance the performance management and improvement system; coach managers on how to handle performance issues
- Create, help implement, and coordinate organizational training and development programs, particularly for senior leaders, using the Mastery Management Model
- Review and approve Mastery-wide compensation philosophy and programs
- Provide overall guidance and leadership to Mastery's compensation program, including salary benchmarking, development of the bonus pool, and changes and additions to employee benefits' plans
- Develop and implement employee satisfaction and retention programs
- Oversee management of the human resources information system and track and analyze human resource related metrics
- Serve as a plan administrator, and/or fiduciary for benefit programs, including 403(b)



- Oversee and conduct audits of schools to ensure compliance with Mastery's HR policies
- Ensure organization compliance with all applicable federal, state, and local laws and regulations
- Maintain current knowledge and understanding of regulations, laws, industry trends, practices, and developments regarding Human Resources that may affect Mastery and advise management and employees accordingly
- Consult with outside legal counsel or other experts, as appropriate

Qualifications:

- Demonstrated knowledge of Human Resource best practices, employment law and state regulations
- Experience in organizational process improvement
- Proven track record of achieving measurable results
- Strong leadership skills and a demonstrated capacity of coaching and supervising a diverse and talented group of professionals
- Effectiveness in working or volunteering in a non-profit that is focused on maintaining high quality work and low overhead
- Prior experience in a fast-paced, growth-oriented organization
- Adept at using MS Office tools such MS Excel & MS Word
- Excellent verbal and written communication skills
- Detail oriented and extremely organized, while being a strategic thinker
- Flexibility and ability to multi-task

Education and Experience:

- Bachelor's degree (Master's preferred) in related field
- Minimum ten (10) years of relevant professional experience

Physical Requirements:

Ability to physically perform the duties and to work in the environmental conditions required such as traveling to network campuses and maneuvering in office space-reaching file cabinets, filing, faxing, scanning, coping, typing, mailing, and making phone calls; Must be able to sit for up to two (2) hours looking at a computer monitor, using a keyboard and mouse and typing.



EXPERIENCE

CEO

Mastery Charter Schools Philadelphia, Pennsylvania

July 2000 to Present

Founder and CEO of Mastery Charter Schools in Philadelphia. Opened the first Mastery high school in September 2001. Mastery currently operates fifteen schools serving 9,500 students in grades K-12. Eleven of Mastery's schools are turnarounds of previously low-performing district schools. Four years after Mastery assumed management of these schools, test scores have increased an average of 40 percentage points per grade and subject, violence decreased by 80%, and student turnover dropped by half. Several Mastery schools, formerly the lowest performing in Philadelphia, have closed the achievement gap. Mastery's school turnaround work has been recognized by President Obama as a national model.

Mastery's success is built upon a robust teacher development system that includes aligned instructional standards, comprehensive teacher training and professional development, and classroom-based Instructional Coaches. In 2011, Mastery received a Bill and Melinda Gates Foundation grant to disseminate its teacher development model to other districts and charter schools.

Consultant

Greater Philadelphia First Philadelphia, Pennsylvania

January 2000 - May 2000

Conducted research to determine employer demand for non-degreed technology workers. Interviewed employers, researched industry employment trends and skill standards and identified national best practices for technology worker training.

President

Home Care Associates Philadelphia, Pennsylvania

1993-1999

Founded worker-owned home health company with a mission to train and employ public assistance recipients. The company is a replication of the nationally recognized Cooperative Home Care Associates of S. Bronx, NYC.

Business Development:

- Secured funding, negotiated loan agreements (\$500k), organized facility, developed MIS system, and hired staff. Obtained contracts with regional health care organizations.
- Grew business to \$2 million in revenue and 85 employees -- 90% of whom were former public assistance recipients.
- Received *Better Business Bureau's Best Health Service Award* for high quality service.

Management

- Created team-based, participatory, management system to improve work flow, encourage innovation and develop staff capabilities. Developed internal mentoring program.
- Trained employees to be worker-owners and sold shares to over 50 field employees. Worked with majority worker-owner Board of Directors.

Education & Training:

- Designed welfare-to-work job training program that trained and placed over 200 adults in health care and clerical jobs.
- Achieved 78% job placement and 70% 12 month job retention for former welfare recipients. Received *Pennsylvania Governors Achievement Award*.
- Developed innovative curriculum that uses experiential activities and group work to build work-appropriate problem solving skills and critical thinking.
- Created "Job Coaching" program to support graduates' welfare-to-work transition by providing intensive feedback and personal counseling.
- Introduced internet accessed, self-directed, computer-based literacy module.
- Secured over \$900,000 in foundation funding and training contracts.

Product Manager - New Product Development

General Foods Corporation, Post Cereal Division White Plains, New York

1988 -1992

- Developed concept and led successful launch of a new cereal called Great Grains. Supervised market research, packaging development, test market, advertising, promotions, trade sell-in and logistical support.
- Managed \$20 million budget for national introduction.
- Achieved highest share of market for a cereal introduced from 1988-92.
- Awarded "Post Quality Achievement Award".

Associate Product Manager, Assistant Product Manager

- Supervised marketing strategies for Grape-Nuts cereal. Analyzed industry trends and competitive strategies and recommended new business opportunities.

RELATED ACTIVITIES

Founded Philadelphia Cares -- a volunteer community service organization with over 3,000 volunteers. Recruited Board of Directors and hired Executive Director. Currently serving as Board Chair. 1993-present.

Philadelphia Private Industry Council board member. 1998

Yale University Elm and Ivy award for work with local homeless project. 1988

EDUCATION

Yale School of Management

Master's of Business Administration, 1988.

Teaching Assistant, "Designing Organizations for Self-Management".

State University of New York at Binghamton

BA, Economics, 1984.

Academic Honors, Phi Beta Kappa.

Harry S. Truman Scholar: One of fifty recipients of national award for "Outstanding potential for public service leadership".



EDUCATION

Jan. 1997 – May 1999

Temple University- Philadelphia Pennsylvania
Master of Education, Secondary Science Education, GPA 3.94

Aug. 1990 – June 1994

Bloomsburg University- Bloomsburg Pennsylvania
Bachelor of Science, Biology, Cum Laude, GPA 3.53

CERTIFICATION

Pennsylvania Instructional II Teaching Certificate- Biology

EMPLOYMENT EXPERIENCE

August 2012- current

Chief of Schools

June 2005 - Current

Chief Academic Officer, Mastery Charter Schools

- Develop and supervise instruction, curricula, assessment and professional development for a four school public charter school district

April 2005 – Current

Principal, Mastery Charter School – Thomas Campus

- Oversee the daily operations of a 400 student secondary school
- Supervise administrators, teachers and support staff
- Develop and implement academic, discipline and enrichment programs

November 2002 – April 2005

Science Academic Coach, North Regional Office, School District of Philadelphia

- Work with teachers on an individual basis and in small groups to design and implement grade-level instructional strategies and best practices
- Develop and conduct various science education professional development workshops
- Ensure that the educational needs of all students are met, including those with diverse learning needs

September 2002 – May 2005

Adjunct Instructor, Temple University, Department of Curriculum, Instruction and Technology in Education

- Teach “Teaching Science N-6” to undergraduate juniors and seniors majoring in elementary education

May 2004 – May 2005

Adjunct Instructor, Community College of Philadelphia, Chemistry Department

- Teach General Chemistry 101 to undergraduates

June 1999 – June 2004

Science Teacher/Curriculum Developer, Community College of Philadelphia

- Design and implement inquiry-based science curricula to Philadelphia high school students in the following programs: Upward Bound, Gear-Up, and Health Careers Opportunity Program

December 2001- November 2002

Coordinator, Philadelphia Futures: Sponsor-A-Scholar Program

- Facilitated parent-mentor-student relationships of approximately 50 high school students
- Developed, planned and implemented activities that encourage a successful high school experience and a positive transition into college
- Tracked students' school and extracurricular performance

May 2001 - December 2001

Education Specialist- Sub-Saharan Africa Region, Nonprofit International Consulting Firm

- Conducted assessments of government, UN and NGO HIV/AIDS education and communication organizations and programs in Sub-Saharan Africa
- Developed education and communication project proposals and recommendations for the HIV/AIDS development community
- Identified methods to assess impact of intervention programs on epidemic

Sept. 1997-June 2001

High School Biology Teacher, William Penn High School, School District of Philadelphia

- Taught tenth grade Biology and twelfth grade Advanced Biology
- Designed and utilized activity and lab based Biology and Advanced Biology curriculum
- Attended all progress meetings with parents and maintained positive and informative relationships by routine mailings, on-line grading and phone conferences
- Established and facilitated robotics club that competed locally and nationally
- Organized several fundraising endeavors
- Served as Junior Class Sponsor

Jan. 1999-Aug 2000

Night School Substitute Science Teacher, Franklin High School, School District of Philadelphia

- Taught Environmental Science, Biology and General Math to high school students and adults.

Jan. 1999 - June 1999

Science Teacher, The Bridge (residential rehabilitation center)

- Designed and implemented general science curriculum to detained adolescents with drug addictions

June 1998-Aug 1998

Math Teacher, Korean Catholic Community Church Summer Education Program

- Designed and taught activity based math program to 3rd and 4th grade Korean immigrants with a wide range of English language skills

June 1997 -Aug. 1997

Science Coordinator, Sat-Tum Summer Day Camp

- Developed and taught a physics curriculum that emphasized the mechanics of amusement rides to 6th, 7th and 8th graders

Oct. 1994 - Dec. 1996

U.S. Peace Corps Volunteer, U.S. Peace Corps/Zimbabwe

- Taught general science to 8th through 11th grade rural Zimbabweans
- Appointed as Head of Science Department
- Designed school science syllabus
- Trained and supervised the performance of other teachers in the science department
- Initiated and organized World Map Mural Club
- Coordinated the first local science fair
- Established and coached the first baseball team in the province
- Wrote grants and received funding from USAID and the Peace Corps Small Project Assistance Program to establish the Fast Winds Windmill Manufacturing Cooperative and install a running water system in a rural village

- Wrote grants, received funding and assisted in establishing several rural based cooperatives including a dress making business, women's uniform producing business, family poultry farm and community based cross-cultural service in which tourists pay a fee to experience rural Shona life

PROFESSIONAL COMMUNITY INVOLVEMENT

October 2004 - December 2004

Pearson Scott Foresman, Critic Reader/Editor- Elementary Science Program

May 2001-November 2002

International Center for HIV/AIDS Communication, Technical Advisor

September 2002 - January 2003

Chestnut Hill College, Act 101 Advisory Board Member

December 2002 -April 2005

Philadelphia Urban Systemic Program, Fellow and Teacher Leader

December 2004 - Current

Pennsylvania Science Teachers Association, Member

January 2003 - Current

National Science Teachers Association, Member



Relevant Experience

Mastery Charter Schools, Philadelphia, Pennsylvania

10/2012 – Present

Chief Academic Officer

Manage 30 person central team that designs and implements academic programming across an 8,000 student, 14 school charter network including curriculum and assessment, teacher coaching, professional development, special education and academic operations. Design and execute principal and school administrator trainings in school management, teacher training and data analysis. Serve as a member of the senior leadership decision making team for entire network. Work closely with Chief of Schools and Regional Directors to support principals and site programming.

Mastery Charter Schools, Philadelphia, Pennsylvania

5/2010 – 10/2012

Deputy Chief Academic Officer

Managed the academic design team ensuring that Mastery wide curricular and assessment resources are rigorous, effective, and implemented appropriately across ten schools. Managed a team of 22 people to create all academic resources, run college initiatives, implement academic operations, coach teachers and design and present teacher and administrator professional development.

Mastery Charter Schools, Philadelphia, Pennsylvania

5/2009-5/2010

Director of Teacher Coaching and Professional Development

Designed and implemented a coaching and professional development program across four campuses including robust multi day administrator training, ongoing coach management and support, and accountability to concrete campus coaching goals. Trained administrators and teachers on school wide data analysis and conferencing. Designed explanation documents and accompanying trainings for a variety of instructional strategies utilized across 130 teachers. Managed the curricular design team.

Teach For America, Philadelphia, Pennsylvania

7/2007-5/2009

National Senior Managing Director of Program

Set strategy for teacher support and development to be executed by 29 urban and rural regions and with over 6,000 teachers. Create strategic vision for Philadelphia-Camden regional teacher training and supervision; oversee 300+ teachers in 100+ schools in Camden and Philadelphia working toward significant measurable academic achievement; hire, train and manage full time staff of 12; design multiple week content specific teacher training programming; create data based performance management system for teacher coaches; manage relationships with diverse constituencies including School District of Philadelphia, University of Pennsylvania and charter school partners; serve on senior leadership team charged with decision making and strategy development in all aspects of our presence in the region.

Teach For America, Philadelphia, Pennsylvania

5/2005 – 7/2007

Managing Director of Program

Designed a region-wide programmatic revamp with new strategies and structures to address corps culture and satisfaction, corps member efficacy, teacher retention and teacher hiring and placement. Managed a six person team to design and implement teacher professional development structures for a corps of 200+ teachers in 80+ schools in Philadelphia. Worked closely with Teach For America national Teacher Support and Development Team to provide feedback on design and strategy initiatives nationwide.

Teach For America, Phoenix, Arizona

7/2002-6/2005

Program Director

Supervised and supported 50 first and second year teachers annually to ensure student achievement of dramatic and measurable gains. Developed and implemented strategic large scale programmatic structures including learning teams, certification and university partnerships, summer programming, inter regional conference, principal relationships, and resource collection and creation.

McAllen High School, McAllen, Texas

8/1999-5/2002

Special Education Math and Science Teacher (Teach For America Corps Member)

Instructed 80+ students daily in Title 1 under-resourced high school; created and implemented differentiated curriculum for Biology, Physical Science, and Health. Monitored 35-45 students' IEPs annually, completing required paperwork and collaborating closely with general education teachers. Selected by administration to chair school wide professional development committee and represent special education on the school site based decision making committee

Education

Northern Arizona University Graduate School, Flagstaff, AZ

Master's of Education in Educational Leadership (K-12 Focus), December 2007

University of Texas, Pan American, Edinburg, TX

Special Education Teacher Certification Coursework, 2001

University of Michigan, Ann Arbor, MI

B.S., Resource Ecology and Management, 1999

Synegy, Inc. **Chester, PA** **7/00 – 5/09**
Market leader in individual and organizational performance management applications software and services

Managing Consultant

- Overall lead of business unit responsible for designing the system architecture and data warehouse of all new client implementations
- Developed and deployed new implementation methodology that reduced average implementation time by 25%
- Established data modeling and data warehousing standards for all new client project implementations
- Served as primary bridge between technical development team and product management team

McMaster-Carr Supply **Dayton, NJ** **4/96 – 5/00**
Multi-billion dollar distributor of commercial and industrial supplies

Project Manager

- Managed special projects designed to improve systems and efficiency of a national distribution center and sales facility
- Implemented large-scale material tracking system that resulted in greater control of material in-transit and resulted in 40% decrease in material loss
- Designed process to estimate shipping charges prior to weighing, resulting in a 99.7% average recovery of charges and reducing processing times by 75%

Neva, Ltd. **Wilmington, DE** **6/93 – 4/96**
Start-up that designed and manufactured high-tech composite engine and body components for race cars

President

- Founding principal and lead engineer

EDUCATION

Carnegie Mellon University, Pittsburgh, PA **1993**
BS Civil/Structural Engineering

- Instructor for undergraduate computing skills course during junior and senior years
- Co-authored course textbook and curriculum 1992

SKILLS**Professional**

- Data modeling, Data analytics, Regression analysis, Data transformations, Data integration, Data warehousing, Product management, Technical sales, Theory of constraints, Project management (critical chain and critical path), Six-sigma, Various implementation methodologies/SDLC

Technical

- Oracle, SQL Server, SAS, MiniTab, ERWin, PS8, MS Project, FoxPro, MS Access, MS Office, C, SQL, UML, HTML, Visual Basic, FORTRAN

PROFESSIONAL EXPERIENCE

Mastery Charter Schools, Philadelphia, PA

Sep 2011 – Present

Chief Financial Officer

- Management of finance and compliance functions
- Planning, budgeting and forecasting for schools and central office
- Oversight of external and internal reporting: annual audit, finance committee and Board reporting, monthly financial reporting package for the schools, etc.
- Oversight of transaction unit work including accounts receivable, accounts payable, ACCESS program billing and payroll
- Oversight of all grants accounting and reporting activities
- Supervision of a Compliance Director responsible for ensuring compliance with all federal, state, and district regulatory requirements

CMF Associates, Philadelphia, PA

Sep 2006 – Sep 2011

Director, Financial Consulting

- Act as CFO for various middle market companies with revenues in the range of \$20 million to \$150 million
- Offer executive business counsel to CEO's, presidents and business owners
- Oversee finance, accounting, information technology, human resources and other administrative functions
- Deliver merger and acquisition services, including financial and accounting due diligence, financial modeling, and transaction structuring
- Manage financial system selection and implementation projects

Select experience includes:

- **CFO of a \$70 million cosmetics company** – Came in when company was acquired by a private equity fund. Implemented new accounting and reporting processes to meet expectations of new owners and lenders. Converted the company from cash to GAAP basis accounting. Prepared the company for its first year audit and managed the audit process. Developed and managed an annual budgeting and planning process, and as well as monthly forecasting processes. Assessed and improved inventory management and costing processes. Managed an IT project to build a stand-alone IT infrastructure after separation from previous owners. Visited European subsidiary and standardized and enhanced international accounting and reporting processes. Project duration: 1.5 years
- **CFO of a \$30 million provider of information technology and performance management services** - Managed the accounting, finance and other administrative staff. Streamlined and simplified accounting and reporting processes. Developed a monthly management reporting process. Developed the annual budgeting process and facilitated completion of the strategic plan, operating and financial budgets. Supported the CEO with a pending management buy-out transaction. Project duration: 8 months
- **CFO of a \$100 million supplier of industrial and commercial lubricants** - Significantly enhanced all back office infrastructure: processes, controls and systems. Institutionalized the month-end close and reporting processes and significantly accelerated the month-end close

timeline. Developed new reporting and analytics processes and tools. Established cash management processes and tools to enhance cash flow. Managed implementation of new accounting and reporting systems. Supported company owners with a merger and managed the integration. Project duration: 1 year

Deloitte Consulting, Philadelphia, PA
Senior Manager (2002 - 2006), CFO Services Practice

1996 - Sep 2006

- Worked with CFOs and finance organizations to deliver services in the areas of: global finance transformation; business process improvement; accounting policy and procedure development; budgeting, planning and forecasting; close, consolidation and reporting optimization; strategic systems planning, selection and implementation
- Led large project teams, and managed multiple complex engagements and customer relationships simultaneously

Select engagements include:

- Led a planning, forecasting and budgeting process review project at a provider of services and products to the healthcare industry
- Led a finance transformation project at a large pharmaceutical company to improve accounting to reporting function, streamline close, consolidation and reporting processes, and realign the organizational structure with business objectives
- Led a global implementation of Hyperion Financial Management (HFM) to facilitate close acceleration and meeting SOX 404 requirements at a specialty chemicals manufacturer
- Led development of a corporate controller's manual that included a comprehensive set of policies and procedures to help the organization manage risk on a timely basis and support the organization's increased focus on controls in preparation for compliance with SOX-404
- Developed a Strategic Information Systems Plan for a grocery store chain
- Practice Development responsibilities included participation in on and off campus recruiting efforts, leading local office Women's initiative program to retain and advance women professionals, serving in the local office learning committee and development of point-of-views for financial reporting, controls monitoring for SOX-404 and financial close optimization

Representative clients included:

Merck
Rohm and Haas
NCR
Wawa

Cardinal Health
Endo Pharmaceuticals
Radian Group, Inc.
Clemens Markets

Tyco International
Bank One
University of Pennsylvania
Henkel

Deloitte & Touche, Philadelphia, PA
Senior Auditor

1992 - 1996

- Provided accounting and auditing services to a variety of public and privately held clients in multiple industries
- Supervised and planned the execution of numerous client engagements
- Facilitated the preparation of audited financial statements in accordance with generally accepted accounting principles
- Led filings of 10-K, IOQ and 8-K documents

EDUCATION

University of Pennsylvania, Philadelphia, PA

May 1992

Bachelor of Science in Economics, Finance and Accounting concentration

OTHER EXPERIENCE AND INTERESTS

Certified Public Accountant

Certified by American Production and Inventory Control Society "APICS"

Speak, read, and write Turkish fluently

Enjoy dancing (Latin and ballroom) and traveling

Appendix E:
Letters of Support
and Memorandum of
Understanding from
Partners

MANAGEMENT AGREEMENT

This Management Agreement (the 'Agreement' is made and entered into as of the July 1st day of 2013 by and between Mastery Charter High School, located at 5700 W 107th Avenue, Philadelphia, Pa. ("Manager") and Mastery Charter School - Lenfest located at 434th Street, Philadelphia, Pa. ("Charter School"). Both parties are charter schools established under the Public School Code of 1949 as amended (the "Code"), including specifically the Article known as the Charter School Law 24 P.S. 1701-A et seq.

RECITALS

- A. Manager was established in 2001 for the purpose of providing an excellent educational choice for students in Philadelphia as more fully set forth in its application to the Philadelphia School District and in its Charter Agreements. Manager has created an administrative and educational expertise and now desires to expand the application of that expertise, Manager has created a unique curriculum and innovative teaching methods which it desires to make more widely available. **Manager** has also developed the executive capacity to carry out its Educational Program in the context of other schools.
- B. Charter School was established in 2001 for the purpose of preparing urban youth for success in higher education and the global economy. Charter School was the result of an invitation from the School District of Philadelphia to Manager to replace an academically struggling middle school with an independent charter school.

THEREFORE, the parties mutually **agree** as follows:

ARTICLE I.

EDUCATIONAL SERVICES AND ADMINISTRATIVE SERVICES

1.01 Educational Services.

- (a) Subject to the requirements of the Code, the Charter, and Board approval (which **approval** shall not be unreasonably withheld), for the Term (as defined in ARTICLE II below), Manager will provide to the Charter School and its students the following educational services (the "Educational Services"):
- (i) Academic Program. Educational program including instructional services such as curriculum and assessments. Instructional personnel, including the principal, teachers, and support staff in accordance with ARTICLE IV below;
 - (ii) Instructional Tools. Instructional tools, equipment and supplies, including text books, computers, software and multi-media teaching tools and such other tools as are appropriate and commonly used in public education but only as agreed to by the Parties;

to be overbroad or an invalid delegation of authority by the Charter School, such Services will be construed to be limited to the extent necessary to make the Services valid and binding.

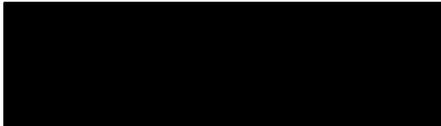
11.11 Successors and Assigns. Except as limited by Section 11.07 above, this Agreement will be binding upon, and inure to the benefit of, the parties and their respective successors and assigns.

11.12 No Third Party Rights. This Agreement is made for the sole benefit of the Charter School and Manager. Except as otherwise expressly provided, nothing in this Agreement will create or be deemed to create a relationship between the parties to this Agreement, or either or them, and any third person, including a relationship in the nature of a third party beneficiary or fiduciary.

11.13 Survival of Termination. All representations, warranties and indemnities made in this Agreement will survive termination of this Agreement.

IN WITNESS WHEREOF, the undersigned have executed this Agreement as of the date and year first above written.

MASTERY CHARTER HIGH SCHOOL



 Board Chair

By: 

Its: CEO

MANAGEMENT AGREEMENT

This Management Agreement (the "Agreement") is made and entered into as of the July 11, day of 2013 by and between Mastery Charter High School, located at 5700 Wayne Avenue, Philadelphia, Pa. ("Manager") and Mastery Charter School - Thomas located at 927 Jolmstoo Street, Philadelphia, Pa. ("Charter School"). Both parties are charter schools established under the Public School Code of 1949, as amended (the "Code"), including specifically the Article known as the Charter School Law, 24 P.S. 1701-A et seq,

RECITALS

- A. Manager was established in 2001 for the purpose of providing an excellent educational choice for students in Philadelphia as more fully set forth in its application to the Philadelphia School District and in its Charter Agreements. Manager has created an administrative and educational expertise and now desires to expand the availability of that expertise. Manager has created a unique curriculum and innovative teaching methods which it desires to make more widely available. Manager has also developed the executive capacity to carry out its Educational Program in the context of Other schools.
- B. Charter School was established in 2005 for the purpose of preparing urban youth for success in higher education and the global economy. Charter School was the result of an invitation from the School District of Philadelphia to Manager to replace an academically struggling middle school with an independent charter school.

THEREFORE, the parties mutually agree as follows:

ARTICLE I.

EDUCATIONAL SERVICES AND ADMINISTRATIVE SERVICES

Educational Services.

- (a) Subject to the requirements of the Code, the Charter, and Board approval (which approval shall not be unreasonably withheld), for the Term (as defined in ARTICLE II below), Manager will provide to the Charter School and its students the following educational services (the "Educational Services"):
- (i) Academic Program. Educational program including instructional services such as curriculum and assessments. Instructional personnel, including the principal, teachers, and support staff in accordance with ARTICLE IV below;
 - (ii) Instructional Tool. Instructional tools, equipment and supplies, including text books, computers, software and multi-media teaching tools and such other tools **as are** appropriate and commonly used in public education but only as agreed to by the Parties;

to be overbroad or an invalid delegation of authority by the Charter School, such Services will be construed to be limited to the extent necessary to make the Services valid and binding.

11.11 Successors and Assigns. Except as limited by Section 11.07 above, this Agreement will be binding upon, and inure to the benefit of, the parties and their respective successors and assigns.

11.12 No Third Party Rights. This Agreement is made for the sole benefit of the Charter School and Manager. Except as otherwise expressly provided, nothing in this Agreement will create or be deemed to create a relationship between the parties to this Agreement, or either or them, and any third person, including a relationship in the nature of a third party beneficiary or fiduciary.

11.13 Survival of Termination. All representations, warranties and indemnities made in this Agreement will survive termination of this Agreement.

IN WITNESS WHEREOF, the undersigned have executed this Agreement as of the date and year first above written.

MASTERY CHARTER HIGH SCHOOL

MASTERY CHARTER SCHOOL - THOMAS

By:  _____

By:  _____

Its: Board Chair

Its: CEO

MANAGEMENT AGREEMENT

This Management Agreement (the "Agreement") is made and entered into as of the July 1st day of 2013 by and between Mastery Charter High School, located at 5700 Wayne Avenue, Philadelphia, Pa. ("Manager") and Mastery Charter School - Shoemaker located at 5301 Media Street, Philadelphia, Pa. ("Charter School"), Both parties are charter schools established under the Public School Code of 1949, as amended (the "Code"), including specifically the Article known as the Charter School Law, 24 P.S. 1701 et seq.

RECITALS

- A. Manager was established in 2001 for the purpose of providing an excellent educational choice for students in Philadelphia as more fully set forth in its application to the Philadelphia School District and in its Charter Agreements. Manager has created an administrative and educational expertise and now desires to expand the application of that expertise. Manager has created a unique curriculum and innovative teaching methods which it desires to make more widely available. Manager has also developed the executive capacity to carry out its Educational Program in the context of other schools.
- B. Charter School was established in 2006 for the purpose of preparing urban youth for success in higher education and the global economy. Charter School was the result of an invitation from the School District of Philadelphia to Manager to replace an academically struggling middle school with an independent charter school.

THEREFORE, the parties mutually agree as follows:

ARTICLE I, EDUCATIONAL SERVICES AND ADMINISTRATIVE SERVICES

1.01 Educational Services.

- (a) Subject to the requirements of the Code, the Charter, and Board approval (which approval shall not be unreasonably withheld), for the Term (as defined in ARTICLE II below), Manager will provide to the Charter School and its students the following educational services (the "Educational Services":)
- (i) Academic Program. Educational program including instructional services such as curriculum and assessments. Instructional personnel, including the principal, teachers, and support staff in accordance with ARTICLE IV below;
 - (ii) Instructional Tools. Instructional tools, equipment and supplies, including text books, computers, software and multi media teaching tools and such other tools as are appropriate and commonly used in public education but only as agreed to by the Parties;

to be overbroad or an invalid delegation of authority by the Charter School, such Services will be construed to be limited to the extent necessary to make the Services valid and binding.

11.11 Successors and Assigns. Except as limited by Section 11.07 above, this Agreement will be binding upon, and inure to the benefit of, the parties and their respective successors and assigns.

11.12 No Third Party Rights. This Agreement is made for the sole benefit of the Charter School and Manager. Except as otherwise expressly provided, nothing in this Agreement will create or be deemed to create a relationship between the parties to this Agreement, or either or them, and any third person, including a relationship in the nature of a third party beneficiary or fiduciary.

11.13 Survival of Termination. All representations, warranties and indemnities made in this Agreement will survive termination of this Agreement.

IN WITNESS WHEREOF, the undersigned have executed this Agreement as of the date and year first above written.

MASTERY CHARTER HIGH SCHOOL

**MASTERY CHARTER SCHOOL -
SHOEMAKER**

By



Its:

Board Chair

By



Its:



MANAGEMENT AGREEMENT

This Management Agreement (the "Agreement") is made and entered into as of the July 14th day of 2013 by and between Mastecy Charter High School, located at 5700 Wayne Avenue, Philadelphia, Pa. ("Manager") **and** Mastery Charter School · Pickett located at 5700 Wayne Avenue, Philadelphia, Pa. ("Charter School"). Both parties are charter schools established under the Public School Code of 1949, as amended (the "Code"), including specifically the Article known as the Charter School Law, 24 P.S. 1701-A et seq.

RECITALS

- A. Manager was established in 2001 for the purpose of providing an excellent educational choice for students in Philadelphia as more fully set forth in its application to the Philadelphia School District and in its Charter Agreements. **Manager** has created an administrative and educational expertise and now desires to expand the application of that expertise. Manager has created a unique curriculum and innovative teaching methods which it desires to make more widely available. **Manager** has also developed the executive capacity to carry out its Educational Program in the context of other schools.
- B. Charter School was established in 2007 for the purpose of preparing urban youth for success in higher education and the global economy. Charter School was the result of an invitation from the School District of Philadelphia to Manager to replace an academically struggling middle school with an independent charter school.

THEREFORE, the parties mutually **agree** as follows:

ARTICLE I.

EDUCATIONAL SERVICES AND ADMINISTRATIVE SERVICES

1.1 Educational Services.

- (a) Subject to the requirements of the Code, the Charter, and Board approval (which approval shall not be unreasonably withheld), for the Term (as defined in ARTICLE II below), **Manager** will provide to the Charter School and its students the following educational services (the "Educational Services"):
- (i) **Academic Program.** Educational program including instructional services such as curriculum and assessments, instructional personnel, including the principal, teachers, and support staff in accordance with ARTICLE IV below;
 - (ii) **Instructional Tools.** Instructional tools, equipment and supplies, including text books, computers, software and multi-media teaching tools and such other tools as are appropriate and commonly used in public education but only as agreed to by the Parties;

to be overbroad or an invalid delegation of authority by the Charter School, such Services will be construed to be limited to the extent necessary to make the Services valid and binding.

11.11 Successors and Assigns. Except as limited by Section 11.07 above, this Agreement will be binding upon, and inure to the benefit of, the parties and their respective successors and assigns.

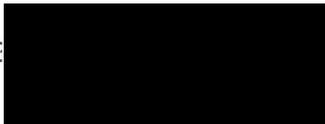
11.12 No Third Party Rights. This Agreement is made for the sole benefit of the Charter School and Manager. Except as otherwise expressly provided, nothing in this Agreement will create or be deemed to create a relationship between the parties to this Agreement, or either or them, and any third person, including a relationship in the nature of a third party beneficiary or fiduciary.

11.13 Survival of Termination. All representations, warranties and indemnities made in this Agreement will survive termination of this Agreement.

IN WITNESS WHEREOF, the undersigned have executed this Agreement as of the date and year first above written.

MASTERY CHARTER HIGH SCHOOL

**MASTERY CHARTER SCHOOL -
PICKETT**

By: 

By: 

Its: Board Chair

Its: 

MANAGEMENT AGREEMENT

This Management Agreement (the "Agreement") is made and entered into as of the July 1st day of 2013 by and between Mastery Charter High School, located at 5700 Wayne Avenue, Philadelphia Pa. ("Manager") and Mastery Charter School-Hamty Elementary located at 5601 Christian Street, Philadelphia Pa. ("Charter School"). Both parties are charter schools established under the Public School Code of 1949, as amended (the "Code"), including specifically the Article known as the Charter School Law, 24 P.S. 1701-A et seq.

RECITALS

- A. Manager was established in 2001 for the purpose of providing an excellent educational choice for students in Philadelphia as more fully set forth in its application to the Philadelphia School District and in its Charter Agreements. Manager has created an administrative and educational expertise and now desires to expand the application of that expertise. Manager has adopted a unique curriculum and innovative teaching methods which it desires to make more widely available. Manager has also developed the executive capacity to carry out its Educational Program in the context of other schools.
- B. Charter School was established in 2010 for the purpose of preparing urban youth for success in elementary education and the global economy. Charter School was the result of an invitation from the School District of Philadelphia to Manager to replace an academically struggling elementary school with an independent charter school.

THEREFORE, the parties mutually agree as follows:

ARTICLE I.

EDUCATIONAL SERVICES AND ADMINISTRATIVE SERVICES

1.1 Educational Services.

- (a) Subject to the requirements of the Code, the Charter, and Board approval (which approval shall not be unreasonably withheld), for the Term (as defined in ARTICLE II below), Manager will provide to the Charter School and its students the following educational services (the "Educational Services");
- (i) Academic Program. Educational program including instructional services such as curriculum and assessments. Instructional personnel, including the principal, teachers, and support staff in accordance with ARTICLE IV below;
- (ii) Instructional Tools. Instructional tools, equipment and supplies, including text books, computers, software and multi-media teaching tools and such other tools as are appropriate and commonly used in public education but only as agreed to by the Parties;

to be overbroad or an invalid delegation of authority by the Charter School, such Services will be construed to be limited to the extent necessary to make the Services valid and binding.

11.11 Successors and Assigns. Except as limited by Section 11.07 above, this Agreement will be binding upon, and inure to the benefit of, the parties and their respective successors and assigns.

11.12 No Third Party Rights. This Agreement is made for the sole benefit of the Charter School and Manager. Except as otherwise expressly provided, nothing in this Agreement will create or be deemed to create a relationship between the parties to this Agreement, or either or them, and any third person, including a relationship in the nature of a third party beneficiary or fiduciary.

11.13 Survival of Termination. All representations, warranties and indemnities made in this Agreement will survive termination of this Agreement.

IN WITNESS WHEREOF, the undersigned have executed this Agreement as of the date and year first above written.

MASTERY CHARTER HIGH SCHOOL

**MASTERY CHARTER SCHOOL -
HARRITY ELEMENTARY**

By



Its: Board chair

By



Its: CFD

MANAGEMENT AGREEMENT

This Management Agreement (the "Agreement") is made and entered into as of 1st July 1st day of 2013 by and between Mastery Charter High School, Located at 5700 Wayne Avenue, Philadelphia, Pa. ("Manager") and Mastery Charter School - Mann Elementary located at 5376 W. Berks Street, Philadelphia, Pa. ("Charter School"). Both parties are charter schools established under the Public School Code of 1949, as amended (the "Code") including specifically the Article known as the Charter School Law, 24 P.S. 1701-A et seq.

RECITALS

- A. Manager was established in 2001 for the purpose of providing an excellent educational choice for students in Philadelphia as more fully set forth in its application to the Philadelphia School District and in its Charter Agreements. Manager has created an administrative and educational expertise and now desires to expand the application of that expertise. Manager has created a unique curriculum and innovative teaching methods which it desires to make more widely available. Manager has also developed the executive capacity to carry out its Educational Program in the context of other schools.
- B. Charter School was established in 2010 for the purpose of preparing urban youth for success in elementary education and the global economy. Charter School was the result of an invitation from the School District of Philadelphia to Manager to replace an academically struggling elementary school with an independent charter school.

THEREFORE, the parties mutually agree as follows:

ARTICLE I.

EDUCATIONAL SERVICES AND ADMINISTRATIVE SERVICES

1.1 Educational Services.

- (a) Subject to the requirements of the Code, the Charter, and Board approval (which approval shall not be unreasonably withheld), for the Term (as defined in ARTICLE II below), Manager will provide to the Charter School and its students the following educational services (the "Educational Services"):
 - (i) Academic Program. Educational program including instructional services such as curriculum and assessments. Instructional personnel, including the principal, teachers, and support staff in accordance with ARTICLE IV below;
 - (ii) Instructional Tools. Instructional tools, equipment and supplies, including text books, computers, software and multi-media teaching tools and such other tools as are appropriate and commonly used in public education but *only* as agreed to by the Parties;

to be overbroad or an invalid delegation of authority by the Charter School, such Services will be construed to be limited to the extent necessary to make the Services valid and binding.

11.11 Successors and Assigns. Except as limited by Section 11.07 above, this Agreement will be binding upon, and inure to the benefit of, the parties and their respective successors and assigns.

11.12 No Third Party Rights. This Agreement is made for the sole benefit of the Charter School and Manager. Except as otherwise expressly provided, nothing in this Agreement will create or be deemed to create a relationship between the parties to this Agreement, or either or them, and any third person, including a relationship in the nature of a third party beneficiary or fiduciary.

11.13 Survival of Termination. All representations, warranties and indemnities made in this Agreement will survive termination of this Agreement.

IN WITNESS WHEREOF, the undersigned have executed this Agreement as of the date and year first above written.

MASTERY CHARTER HIGH SCHOOL

**MASTERY CHARTER SCHOOL –
MANN ELEMENTARY**

By:  _____

By:  _____

Its: Board Chair _____

Its: CFO _____

MANAGEMENT AGREEMENT

This Management Agreement (the "Agreement") is made and entered into as of the July 1st day of 2013 by and between Mastery Charter High School, located at 5700 Wayne Avenue, Philadelphia, Pa. ("Manager") and Mastery Charter School - Smedley Elementary located at 1790 Bridge Street, Philadelphia, Pa. ("Charter School"). Both parties are charter schools established under the Public School Code of 1949, as amended (the "Code"), including specifically the Article known as the Charter School Law, 24 P.S. 1701-A et seq.

RECITALS

- A. Manager was established in 2001 for the purpose of providing an excellent educational choice for students in Philadelphia as more fully set forth in its application to the Philadelphia School District and in its Charter Agreements. Manager has created an administrative and educational expertise and now desires to expand the application of that expertise. Manager has created a unique curriculum and innovative teaching methods which it desires to make more widely available. Manager has also developed the executive capacity to carry out its Educational Program in the context of other schools.
- B. Charter School was established in 2010 for the purpose of preparing urban youth for success in elementary education and the global economy. Charter School was the result of an invitation from the School District of Philadelphia to Manager to replace an academically struggling elementary school with an independent charter school.

THEREFORE, the parties mutually agree as follows:

ARTICLE I

EDUCATIONAL SERVICES AND ADMINISTRATIVE SERVICES

1.1 Educational Services.

- (a) Subject to the requirements of the Code, the Charter, and Board approval (which approval shall not be unreasonably withheld), for the Term (as defined in ARTICLE II below), Manager will provide to the Charter School and its students the following educational services (the "Educational Services"):
- 1. Academic Program. Educational program including instructional services such as curriculum and assessments. Instructional personnel, including the principal, teachers, and support staff in accordance with ARTICLE IV below;
 - 2. Instructional Tools. Instructional tools, equipment and supplies, including textbooks, computers, software and multi-media teaching tools and such other tools as are appropriate and commonly used in public education but only as agreed to by the Parties;

to be overbroad or an invalid delegation of authority by the Charter School, such Services will be construed to be limited to the extent necessary to make the Services valid and binding.

11.11 Successors and Assigns. Except as limited by Section 11.07 above, this Agreement will be binding upon, and inure to the benefit of, the parties and their respective successors and assigns.

11.12 No Third Party Rights. This Agreement is made for the sole benefit of the Charter School and Manager. Except as otherwise expressly provided, nothing in this Agreement will create or be deemed to create a relationship between the parties to this Agreement, or either or them, and any third person, including a relationship in the nature of a third party beneficiary or fiduciary.

11.13 Survival of Termination. All representations, warranties and indemnities made in this Agreement will survive termination of this Agreement.

IN WITNESS WHEREOF, the undersigned have executed this Agreement as of the date and year first above written.

MASTERY CHARTER HIGH SCHOOL

**MASTERY CHARTER SCHOOL -
SMEDLEY ELEMENTARY**

By: _____

By: _____

Its: _____

Its: _____

Board Chair

CEO

MANAGEMENT AGREEMENT

This Management Agreement (the "Agreement") is made and entered into as of the July 1st day of 2013 by and between Mastery Charter High School, located at 5700 Wayne Avenue, Philadelphia, Pa. ("Manager") and Mastery Charter School - Clymer Elementary located at 1201 West Rush Street, Philadelphia, Pa. ("Charter School"). Both parties are charter schools established under the Public School Code of 1949, as **amended** (the "Code"), including specifically the Article known as the Charter School Law, 24 P.S. 1701-A et seq.

RECITALS

- A. Manager was established in 2001 for the purpose of providing an excellent educational choice for students in Philadelphia as more fully set forth in its application to the Philadelphia School District and in its Charter Agreements. Manager has created an administrative and educational expertise and now desires to expand the application of that expertise. Manager has created a unique curriculum and innovative teaching methods which it desires to make more widely available. Manager has also developed the executive capacity to carry out its Educational Program in the context of other schools.
- B. Charter School was established in 2011 for the purpose of preparing urban youth for success in elementary education and the global economy. Charter School was the result of an invitation from the School District of Philadelphia to Manager to replace an academically struggling elementary school with an independent charter school.

THEREFORE the parties mutually agree as follows:

ARTICLE I. EDUCATIONAL SERVICES AND ADMINISTRATIVE SERVICES

LQ1. Educational Services.

- (a) Subject to the requirements of the Code, the Charter, and Board approval (which approval shall not be unreasonably withheld), for the Term (as defined in ARTICLE II below), Manager will provide to the Charter School and its students the following educational **services** (the "Educational Services"):
- (i) Academic Program. Educational program including instructional services such as curriculum and assessments. Instructional personnel, including the principal, teachers, and support staff in accordance with ARTICLE IV below;
 - (ii) Instructional Tools. Instructional tools, equipment and supplies, including text books, computers, software and multi-media teaching tools and such other tools as are appropriate and commonly used in public education but only as agreed to by the Parties;

to be overbroad or an invalid delegation of authority by the Charter School, such Services will be construed to be limited to the extent necessary to make the Services valid and binding.

11.11 Successors and Assigns. Except as limited by Section 11.07 above, this Agreement will be binding upon, and inure to the benefit of, the parties and their respective successors and assigns.

11.12 No Third Party Rights. This Agreement is made for the sole benefit of the Charter School and Manager. Except as otherwise expressly provided, nothing in this Agreement will create or be deemed to create a relationship between the parties to this Agreement, or either or them, and any third person, including a relationship in the nature of a third party beneficiary or fiduciary.

11.13 Survival of Termination. All representations, warranties and indemnities made in this Agreement will survive termination of this Agreement.

IN WITNESS WHEREOF, the undersigned have executed this Agreement as of the date and year first above written.

MASTERY CHARTER HIGH SCHOOL

**MASTERY CHARTER SCHOOL -
CLYMER ELEMENTARY**

By



Its:

Board Chair

By



Its:

CFO

MANAGEMENT AGREEMENT

This Management Agreement (the "Agreement") is made and entered into as of the July 1st day of 2013 by and between Mastery Charter High School, located at 5700 Wayne Avenue, Philadelphia, Pa. ("Manager") and Hardy Williams Academy Charter School located at 1712 S. 56th Street, Philadelphia, Pa. ("Charter School"). Both parties are charter schools established under the Public School Code of 1949, as amended (the "Code"), including specifically the Article known as the Charter School Law, 24 P.S. 1701-A et seq.

RECITALS

- A. Manager was established in 2001 for the purpose of providing an excellent education, a choice for students in Philadelphia as more fully set forth in its application to the Philadelphia School District and in its Charter Agreements. Manager has created an administrative and educational expertise and now desires to expand the application of that expertise. Manager has created a unique curriculum and innovative teaching methods which it desires to make more widely available. Manager has also developed the executive capability within its Educational Program in the context of other schools.
- B. Charter School was established in 2011 for the purpose of preparing urban youth for success in higher education and to lead the global economy. Charter School was the result of an invitation from the School District of Philadelphia to Manager to replace an academically struggling school with an independent charter school.

THEREFORE, the parties mutually agree as follows:

ARTICLE I.

EDUCATIONAL SERVICES AND ADMINISTRATIVE SERVICES

1.1 Educational Services.

- (a) Subject to the requirements of the Code, the Charter, and Board approval (which approval shall not be unreasonably withheld), for the Term (as defined in ARTICLE II below) Manager will provide to the Charter School and its students the following educational services (the "Educational Services"):
- (i) Academic Programs. Educational program including instructional services such as curriculum and assessments. Instructional personnel, including the principal, teachers, and support staff in accordance with ARTICLE IV below;
 - (ii) Instructional Tools. Instructional tools, equipment and supplies, including text books, computers, software and multi-media teaching tools and such other tools as are appropriate and commonly used in public education but only as agreed to by the Parties;

to be overbroad or an invalid delegation of authority by the Charter School, such Services will be construed to be limited to the extent necessary to make the Services valid and binding.

11.11 Successors and Assigns. Except as limited by Section 11.07 above, this Agreement will be binding upon, and inure to the benefit of, the parties and their respective successors and assigns.

11.12 No Third Party Rights. This Agreement is made for the sole benefit of the Charter School and Manager. Except as otherwise expressly provided, nothing in this Agreement will create or be deemed to create a relationship between the parties to this Agreement, or either or them, and any third person, including a relationship in the nature of a third party beneficiary or fiduciary.

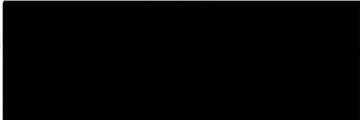
11.13 Survival of Termination. All representations, warranties and indemnities made in this Agreement will survive termination of this Agreement.

IN WITNESS WHEREOF, the undersigned have executed this Agreement as of the date and year first above written.

MASTERY CHARTER HIGH SCHOOL

**HARDY WILLIAMS ACADEMY
CHARTER SCHOOL**

By: _____



Its: _____

Board Chair

By: _____



Its: _____



MANAGEMENT AGREEMENT

This Management Agreement (the "Agreement") is made and entered into as of the July 1st day of 2013 by and between Mastery Charter High School, located at 5700 Wayne Avenue, Philadelphia, Pa. ("Manager") and Mastery Charter School- Gratz Campus located at 1798 West Hunting Park Avenue, Philadelphia, Pa. ("Charter School"). Both parties are charter schools established under the Public School Code of 1949, as amended (the "Code"), including specifically the Article known as the Charter School Law, 24 P.S. 1701-A et seq.

RECITALS

- A. Manager was established in 2001 for the purpose of providing an excellent educational choice for students in Philadelphia as more fully set forth in its application to the Philadelphia School District and in its Charter Agreements. Manager has created an administrative and educational expertise and now desires to expand the application of that expertise. Manager has created a unique curriculum and innovative teaching methods which it desires to make more widely available. Manager has also developed the executive capacity to carry out its Education I Program in the context of other schools.
- B. Charter School was established in 2011 for the purpose of preparing urban youth for success in elementary education and the global economy. Charter School was the result of an invitation from the School District of Philadelphia to Manager to replace an academically struggling elementary school with an independent charter school.

THEREFORE, the parties mutually agree as follows:

ARTICLE I.

EDUCATIONAL SERVICES AND ADMINISTRATIVE SERVICES

1.01 Educational Services.

- (a) Subject to the requirements of the Code, the Charter, and Board approval (which approval shall not be unreasonably withheld), for the Term (as defined in ARTICLE II below), Manager will provide to the Charter School and its students the following educational services (the "Educational Services"):
- (i) Academic Program. Educational program including instructional services such as curriculum and assessments. Instructional personnel, including the principal, teachers, and support staff in accordance with ARTICLE IV below;
 - (ii) Instructional Tools. Instructional tools, equipment and supplies, including text books, computers, software and multimedia teaching tools and such other tools are appropriate and commonly used in public education but only as agreed to by the Parties;

to be overbroad or an invalid delegation of authority by the Charter School, such Services will be construed to be limited to the extent necessary to make the Services valid and binding.

11.11 Successors and Assigns. Except as limited by Section 11.07 above, this Agreement will be binding upon, and inure to the benefit of, the parties and their respective successors and assigns.

11.12 No Third Party Rights. This Agreement is made for the sole benefit of the Charter School and Manager. Except as otherwise expressly provided, nothing in this Agreement will create or be deemed to create a relationship between the parties to this Agreement, or either or them, and any third person, including a relationship in the nature of a third party beneficiary or fiduciary.

11.13 Survival of Termination. All representations, warranties and indemnities made in this Agreement will survive termination of this Agreement.

IN WITNESS WHEREOF, the undersigned have executed this Agreement as of the date and year first above written.

MASTERY CHARTER HIGH SCHOOL

**MASTERY CHARTER SCHOOL -
GRATZ CAMPUS**

By



Its: Board Chair

By:



Its: CFC

MANAGEMENT AGREEMENT

This Management Agreement (the "Agreement") is made and entered into as of the July 1st day of 2013 by and between Mastery Charter High School, located at 5700 Wayne Avenue, Philadelphia, Pa. ("Manager") and Grover Cleveland Mastery Charter School located at 3701 N. 19th Street Philadelphia, Pa. ("Charter School"). Both parties are charter schools established under the Public School Code of 1949, as amended (the "Code") including specifically the Article known as the Charter School Law, 24 P.S. 1701-A et seq.

RECITALS

- A. Manager was established in 2001 for the purpose of providing an excellent educational choice for students in Philadelphia as more fully set forth in its application to the Philadelphia School District and in its Charter Agreements. Manager has created an administrative and educational expertise and now desires to expand the application of that expertise. Manager has created a unique curriculum and innovative teaching methods which it desires to make more widely available. Manager has also developed the executive capacity to carry out its Educational Program in the context of other schools.
- B. Charter School was established in 2012 for the purpose of preparing urban youth for success in elementary education and the global economy. Charter School was the result of an invitation from the School District of Philadelphia to Manager to replace an academically struggling elementary school with an independent charter school.

THEREFORE, the parties mutually **agree** as follows:

ARTICLE I.

EDUCATIONAL SERVICES AND ADMINISTRATIVE SERVICES

1. Educational Services.

- (a) Subject to the requirements of the Code, the Charter, and Board approval (which approval shall not be unreasonably withheld), for the Term (as defined in ARTICLE II below), Manager will provide to the Charter School and its students the following educational services (the "Educational Services"):
- (i) Academic Program Educational program including instructional services such as curriculum and assessments. Instructional personnel, including the principal, teachers, and support staff in accordance with ARTICLE IV below;
 - (ii) Instructional Tools. Instructional tools, equipment and supplies, including text books, computers, software and multi-media teaching tools and such other tools as are appropriate and commonly used in public education but only as agreed to by the Parties;

to be overbroad or an invalid delegation of authority by the Charter School, such Services will be construed to be limited to the extent necessary to make the Services valid and binding.

11.11 Successors and Assigns. Except as limited by Section 11.07 above, this Agreement will be binding upon, and inure to the benefit of, the parties and their respective successors and assigns.

11.12 No Third Party Rights. This Agreement is made for the sole benefit of the Charter School and Manager. Except as otherwise expressly provided, nothing in this Agreement will create or be deemed to create a relationship between the parties to this Agreement, or either or them, and any third person, including a relationship in the nature of a third party beneficiary or fiduciary.

11.13 Survival of Termination. All representations, warranties and indemnities made in this Agreement will survive termination of this Agreement.

IN WITNESS WHEREOF, the undersigned have executed this Agreement as of the date and year first above written.

MASTERY CHARTER HIGH SCHOOL

**GROVER CLEVELAND MASTERY
CHARTER SCHOOL**

By: _____



Its: _____

Board Chair

By: _____



Its: _____

CEO

MANAGEMENT AGREEMENT

This Management Agreement (the "Agreement") is made and entered into as of the July 1st day of 2013 by and between Mastery Charter High School, located at 5700 Wayne Avenue, Philadelphia, Pa. ("Manager") and Francis D. Pastorius Mastery Charter School located at 5650 Sprague Street, Philadelphia, Pa. ("Charter School"). Both parties are charter schools established under the Public School Code of 1949, as amended (the "Code") including specifically the Article known as the Charter School Law, 24 P.S. 1701-A et seq.

RECITALS

- A. Manager was established in 2001 for the purpose of providing an excellent educational choice for students in Philadelphia as more fully set forth in its application to the Philadelphia School District and in its Charter Agreements. Manager has created an administrative and educational expertise and now desires to expand the application of that expertise. Manager has created a unique curriculum and innovative teaching methods which it desires to make more widely available. Manager has also developed the executive capacity to carry out its Educational Program in the context of other schools.
- B. Charter School was established in 2013 for the purpose of preparing urban youth for success in elementary education and the global economy. Charter School was the result of an invitation from the School District of Philadelphia to Manager to replace an academically struggling elementary school with an independent charter school.

THEREFORE, the parties, mutually agree as follows:

ARTICLE I.

EDUCATIONAL SERVICES AND ADMINISTRATIVE SERVICES

1.1 Educational Services.

- (a) Subject to the requirements of the Code, the Charter, and Board approval (which approval shall not be unreasonably withheld), for the Term (as defined in ARTICLE II below), Manager will provide to the Charter School and its students the following educational services (the "Educational **Services**"):
- (i) Academic Program. Educational program including instructional services such as curriculum and assessments. Instructional personnel, including the principal, teachers, and support staff in accordance with ARTICLE IV below;
 - (ii) Instructional Tools. Instructional tools, equipment and supplies, including text books, computers, software and multi-media teaching tools and such other tools as are appropriate and commonly used in public education but only as agreed to by the Parties;

to be overbroad or an invalid delegation of authority by the Charter School, such Services will be construed to be limited to the extent necessary to make the Services valid and binding.

11.11 Successors and Assigns. Except as limited by Section 11.07 above, this Agreement will be binding upon, and inure to the benefit of, the parties and their respective successors and assigns.

11.12 No Third Party Rights. This Agreement is made for the sole benefit of the Charter School and Manager. Except as otherwise expressly provided, nothing in this Agreement will create or be deemed to create a relationship between the parties to this Agreement, or either or them, and any third person, including a relationship in the nature of a third party beneficiary or fiduciary.

11.13 Survival of Termination. All representations, warranties and indemnities made in this Agreement will survive termination of this Agreement.

IN WITNESS WHEREOF, the undersigned have executed this Agreement as of the date and year first above written.

MASTERY CHARTER HIGH SCHOOL

By: _____

Its: _____

Board Chair

**FRANCIS D. PASTORIUS MASTERY
CHARTER SCHOOL**

By: _____

Its: _____

CFO

MANAGEMENT AGREEMENT

This Management Agreement (the "Agreement") is made and entered into as of the July 1st day of 2015 by and between Mastery Charter High School, located at 5700 Wayne Avenue, Philadelphia, Pa. ("Manager") and Frederick Douglass Mastery Charter School located at 2118 W. Norris Street, Philadelphia, Pa. ("Charter School"). Both parties are charter schools established under the Public School Code of 1949, as amended (the "Code"), including specifically the Article known as the Charter School Law, 24 P.S., 1701.1 et seq.

REOTALS

- A. Manager was established in 2001 for the purpose of providing an excellent educational choice for students in Philadelphia as more fully set forth in its application to the Philadelphia School District and in its Charter Agreements. Manager has created an administrative and educational expertise and now desires to expand the application of that expertise. Manager has created a unique curriculum and innovative teaching methods which it desires to make more widely available. Manager has also developed the executive capacity to carry out its Educational Program in the context of other schools.
- B. Charter School was established in 2010 for the purpose of preparing urban youth for success in elementary education and the global economy. Charter School was the result of an invitation from the School District of Philadelphia to **Manager** to replace an academically struggling elementary school with an independent charter school.

THEREFORE the parties mutually agree as follows:

ARTICLE I.

EDUCATIONAL SERVICES AND ADMINISTRATIVE SERVICES

I.Q.1 Educational Services.

- (a) Subject to the requirements of the Code, the Charter, and Board approval (which approval shall not be unreasonably withheld), for the Term (as defined in ARTICLE II below), Manager will provide to the Charter School and its students the following educational services (the "Educational Services");
- (i) Academic Program. Educational program including instructional services such as curriculum and assessments. Instructional personnel including the principal, teachers, and support staff in accordance with ARTICLE IV below;
- (ii) Instructional Tools. Instructional tools, equipment and supplies, including text books, computers, software and multi-media teaching tools and such other tools as are appropriate and commonly used in public education but only as agreed to by the Parties;

to be overbroad or an invalid delegation of authority by the Charter School, such Services will be construed to be limited to the extent necessary to make the Services valid and binding.

11.11 Successors and Assigns. Except as limited by Section 11.07 above, this Agreement will be binding upon, and inure to the benefit of, the parties and their respective successors and assigns.

11.12 No Third Party Rights. This Agreement is made for the sole benefit of the Charter School and Manager. Except as otherwise expressly provided, nothing in this Agreement will create or be deemed to create a relationship between the parties to this Agreement, or either or them, and any third person, including a relationship in the nature of a third party beneficiary or fiduciary.

11.13 Survival of Termination. All representations, warranties and indemnities made in this Agreement will survive termination of this Agreement.

IN WITNESS WHEREOF, the undersigned have executed this Agreement as of the date and year first above written.

MASTERY CHARTER HIGH SCHOOL

By:  _____

Its: Board Chair _____

FREDERICK DOUGLASS MASTERY CHARTER SCHOOL

By:  _____

Its: CEO _____

MANAGEMENT AGREEMENT

This Management Agreement (the "Agreement") is made and entered into as of the _____ day of June 2016 by and between Mastery Charter High School, located at 35 South 4th Street, Philadelphia, Pa. ("Manager") and Mastery Charter School - Wister Elementary located at 67 E. Bringhurst St., Philadelphia, Pa. ("Charter School"). Both parties are charter schools established under the Public School Code of 1949, as amended (the "Code"), including specifically the Article known as the Charter School Law, 24 P.S. §§ 1701-A .

RECITALS

- A. Manager was established in 2001 for the purpose of providing an excellent educational choice for students in Philadelphia as more fully set forth in its application to the Philadelphia School District and in its Charter Agreements.

Manager has created an administrative and educational expertise and now desires to expand the application of that expertise.

Manager has created a unique curriculum and innovative teaching methods which it desires to make more widely available.

Manager has also developed the executive capacity to carry out its Educational Program in the context of other schools.

- B. Charter School was selected for the Renaissance Program of the Philadelphia School District in 2010. Pursuant to the process of renewal of its charter in 2016 Manager was selected to govern the Charter School and this Agreement is executed by the Parties to implement the terms of that renewal.

THRRRRFORE, the parties mutually agree as follows...:::

ARTICLE I.

EDUCATIONAL SERVICES AND ADMINISTRATIVE SERVICES

1.1 Educational Services.

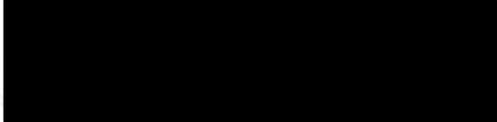
- (a) Subject to the requirements of the Code, the Charter, and Board approval (which approval shall not be unreasonably withheld), for the Term (as defined in ARTICLE II below), Manager will provide the Charter School and its students the following educational services (the "Educational Services"):
- (i) Instruction. Instructional services and personnel, including the principal, teachers and support staff in accordance with ARTICLE V below;
 - (ii) Instructional Tools. Instructional tools, equipment and supplies, including text books, computers, software and multi-media teaching tools and such other tools as are appropriate and commonly used in public education;

either or them, and any third person, including a relationship in the nature of a third party beneficiary or fiduciary.

12.13 Survival of Termination. All representations, warranties and indemnities made in this Agreement will survive termination of this Agreement.

IN WITNESS WHEREOF, the undersigned have executed this Agreement as of the date and year first above written.

MASTERY CHARTER HIGH SCHOOL

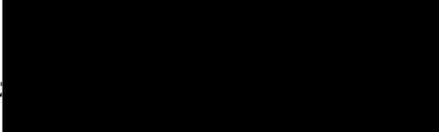
By: 

By: _____

Its: _____

Its: _____

MASTERY CHARTER SCHOOL JOHN WISTER ELEMENTARY

By: 

By: _____

Its: _____

Its: _____

6/8/2014
Date



For Manager
Mastery Charter High School

6/8/2014
Date



(SEAL)

MANAGEMENT AGREEMENT

This Management Agreement (the "Agreement") is made and entered into as of the 1st day of July 2014 by and between Mas ry Charter High School, located at 5700 Wayne Avenue, Philadelphia, PA 19144 ("Manager") and Mastery Schools of Camden, Inc. ("School"). Both parties are public schools established pursuant to the Pennsylvania School Law and the New Jersey Urban Hope Act, respectively.

RECITALS

A. Manager was established in 2001 for the purpose of providing an excellent educational choice for public school students.

Manager has created an administrative and educational expertise and now desires to expand the application of that expertise.

Manager has created a unique curriculum and innovative teaching methods which it desires to make more widely available.

Manager has also developed the executive capacity to carry out its Educational Program in the context of other schools.

B. The School is duly approved by the Commissioner of Education to operate effective July 1, 2014 as a public school as part of a Renaissance Project under the New Jersey Urban Hope Act, N.J.S.A. 18A:36C-1 *et seq.*

THEREFORE, the parties mutually agree as follows:

ARTICLE I.

EDUCATIONAL SERVICES AND ADMINISTRATIVE SERVICES

1.01 Educational Services.

- (a) Subject to the requirements of New Jersey Law, for the Term (as defined in ARTICLE II below), Manager will provide the School and its students the following educational services (the "Educational Services"):
- (i) Instructional Personnel. Instructional services and personnel, including the School Leader and support staff in accordance with ARTICLE V below;
 - (ii) Instructional Tools. Instructional tools, equipment and supplies, including text books computer, software and multi-media teaching tools and such other tools as are appropriate and commonly used in public education;
 - (iii) Extra-Curricular and Co-Curricular Programs. Extra-curricular and Co-curricular activities and programs only as agreed to by the Parties (but not Supplemental Programs as defined in ARTICLE IV below); and

2843958

IN WITNESS WHEREOF, the undersigned have executed this Agreement as of the date and year first above written.

MASTERY CHARTER HIGH SCHOOL

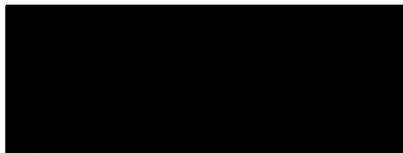
By:  _____
Scott Gordon

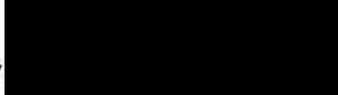
Its: CEO

By:  _____
Robert Victor

Its: Board Chair

MASTERY SCHOOLS OF CAMDEN, INC.

 _____
Its: Board Chair

By:  _____
Keturah Robinson

Its: Board Member, Qualifying Founder

Appendix A: TIF Optional Requirements Checklist

TIF APPLICATION REQUIREMENTS CHECKLIST (OPTIONAL)

To be considered for funding, applicants must address the following general program application and program requirements that the NIA requires. To ensure the fulfillment of every program requirement and authorized activity listed below, the Department strongly encourages the applicant, to indicate the page number(s) where the specific component is located in the program narrative on the left side of the page for the elements of the Absolute Priority and Requirement 1.

<p>(a) pp. 7-30</p> <p>(1) pp. 5,6,8,17,31</p> <p>(2) pp. 11,12,14-16, 21-27, 32</p> <p>(3) pp. 7-32</p> <p>(4) pp. 7-32, 35-37</p>	<p>Absolute Priority: An LEA-wide Human Capital Management System (HCMS) with Educator Evaluation and Support Systems at the Center.</p> <p>(a) To meet this priority, the applicant must include, in its application, a description of its LEA-wide Human Capital Management System (HCMS), as it exists currently and with any modifications proposed for implementation during the project period of the grant.</p> <p>(1) A description of how the HCMS is or will be aligned with the LEA’s vision of instructional improvement;</p> <p>(2) A description of how the LEA uses or will use the information generated by the Evaluation and Support System it describes in its application to inform key human capital decisions, such as decisions on recruitment, hiring, placement, retention, dismissal, compensation, professional development, tenure, and promotion;</p> <p>(3) A description of the human capital strategies the LEA uses or will use to ensure that High-Need Schools are able to attract and retain effective Educators.</p> <p>(4) Whether or not modifications are needed to an existing HCMS to ensure that it includes the features described in response to paragraphs (1), (2), and (3) of this priority, and a timeline for implementing the described features, provided that the use of evaluation information to inform the design and delivery of professional development and the award of performance-based compensation under the applicant’s proposed Performance-based Compensation Systems in High-Need Schools begins no later than the third year of the grant’s project period in the High-Need Schools listed in response to paragraph (a) of Requirement 2--Documentation of High-Need Schools.</p>
<p>(b) pp. 19-28</p> <p>(1) pp. 19-28</p> <p>(2) p. 28</p>	<p><u>Requirement 1: Implementation of Performance-based Compensation Systems:</u></p> <p>Each applicant must describe a plan to develop and implement Performance-based Compensation Systems for teachers, principals, and other personnel in High-Need Schools in LEAs, including charter schools that are LEAs.</p> <p>Applications must: address how applicants will implement Performance-based Compensation Systems as defined in this notice.</p> <p>Applicants also must demonstrate that such Performance-based Compensation Systems are developed with the input of teachers and school leaders in the schools and LEAs to be served by the grant.</p>

Mastery Charter Schools Teacher Incentive Fund 5 Proposal

“Mastery 3.0 Opportunity Culture Human Capital Management System Redesign Project”

APPENDIX F: OTHER DOCUMENTS

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TIF 5 Application

Mastery Charter Schools: Documentation of High Need Schools

School Name	Grade Configuration	% of Students Qualifying for Free or Reduced Price Lunch	% African American and/or Hispanic	Priority School?*
Mastery Charter High School – Lenfest Campus (LEA 1)	7-12	78%	95%	
Mastery Charter School Thomas Campus – High School (LEA 2)	7-12	83%	64%	
Mastery Charter School Thomas Elementary (LEA 2)	K-6	80%	53%	
Mastery Charter School Shoemaker Campus (LEA 3)	7-12	89%	98%	
Mastery Charter School Pickett Campus (LEA 4)	6-12	91%	99%	
Mastery Charter School Harrity Elementary (LEA 5) – Lower School Campus	K-5	96%	99%	
Mastery Charter School Harrity Elementary (LEA 5) – Upper School Campus	6-8	94%	100%	
Mastery Charter School Mann Elementary (LEA 6)	K-6	91%	96%	
Mastery Charter School Smedley Elementary (LEA 7)	K-6	97%	92%	
Mastery Charter School Clymer (LEA 8)	K-6	97%	98%	
Hardy Williams Academy Charter School – ELEMENTARY (LEA 9)	K-6	89%	99%	X
Hardy Williams Academy Charter School – HIGH SCHOOL (LEA 9)	7-12	79%	100%	X
Mastery Charter School Gratz – Prep Middle School (LEA 10)	6-8	73%	98%	X
Mastery Charter School Gratz – Lower School (LEA 10)	9-10	68%	99%	X
Mastery Charter School Gratz – Senior High (LEA 10)	11-12	87%	99%	X
Mastery Charter School Cleveland Elementary – Lower School (LEA 11)	K-5	99%	97%	X
Mastery Charter School Cleveland – Upper School (LEA 11)	6-8	99%	99%	X
Francis D. Pastorius Mastery Charter School (LEA 12)	K-8	91%	97%	
Mastery Schools of Camden - Cramer Hill Elementary (LEA 13)	K-4	98%	98%	
Mastery Schools of Camden - East Camden Middle School (LEA 13)	6-8	92%	98%	
Mastery Schools of Camden - McGraw Elementary School (LEA 13)	K-5	98%	99%	
Mastery Schools of Camden - Molina Elementary School (LEA 13)	K-8	94%	100%	

Mastery Schools of Camden - North Camden Elementary (LEA 13)	K-7	99%	98%	
Frederick Douglass Mastery Charter School – Lower School (LEA 14)	K-5	79%	99%	
Frederick Douglass Mastery Charter School – Upper School (LEA 14)	6-8	84%	99%	
Mastery Charter School John Wister Campus (LEA 15)	K-5	100%**	96%	X
Mastery Camden High School (LEA 13)	9-12	***	***	
Mastery Charter School Gillespie Campus (LEA 16) – opening fall 2017	K-6	****	****	

*Pennsylvania’s listing of allocations for School Improvement for the 2015-2016 school year includes the following Mastery LEAs:

AUN	LEAInstName	Schl	SchoolName	Status	Allocation
126513290	Hardy Williams Academy CS Hardy Williams Academy CS	7588	Hardy Williams Academy CS	Priority	\$69,832.00 \$69,832.00
126519644	Mastery CS - Cleveland Elementary Mastery CS - Cleveland Elementary	8259	Mastery CS - Cleveland Elementary	Priority	\$69,832.00 \$69,832.00
126513734	Mastery CS-Gratz Campus Mastery CS-Gratz Campus	8207	Mastery CS-Gratz Campus	Priority	\$69,832.00 \$69,832.00
126515001	Philadelphia City SD	3731	Wister John Sch	Priority	\$79,832.00

Information about Pennsylvania’s approved request for ESEA flexibility can be found here: <http://www2.ed.gov/policy/elsec/guid/esea-flexibility/map/pa.html>.



U.S. Department of Education

Student Loans	Grants	Laws
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LAWS & GUIDANCE / ELEMENTARY & SECONDARY EDUCATION

Pennsylvania

The Pennsylvania Department of Education's ESEA flexibility request was approved on August 20, 2013.

Approved ESEA Flexibility Request

Current Version

- Approved ESEA Flexibility Request (Amended)
(September 8, 2015)

**Wister will be a new school for Mastery in 2016-17 and was previously managed by the School District of Philadelphia. Starting in 2014-15, SDP opted into the Community Eligibility Provision (CEP) to eliminate paper applications for free/reduced lunch and provide free breakfast and lunch to all students. The reported Economically Disadvantaged level is determined by the number of Identified Students with a multiplier of 1.6, and capped at 100%.

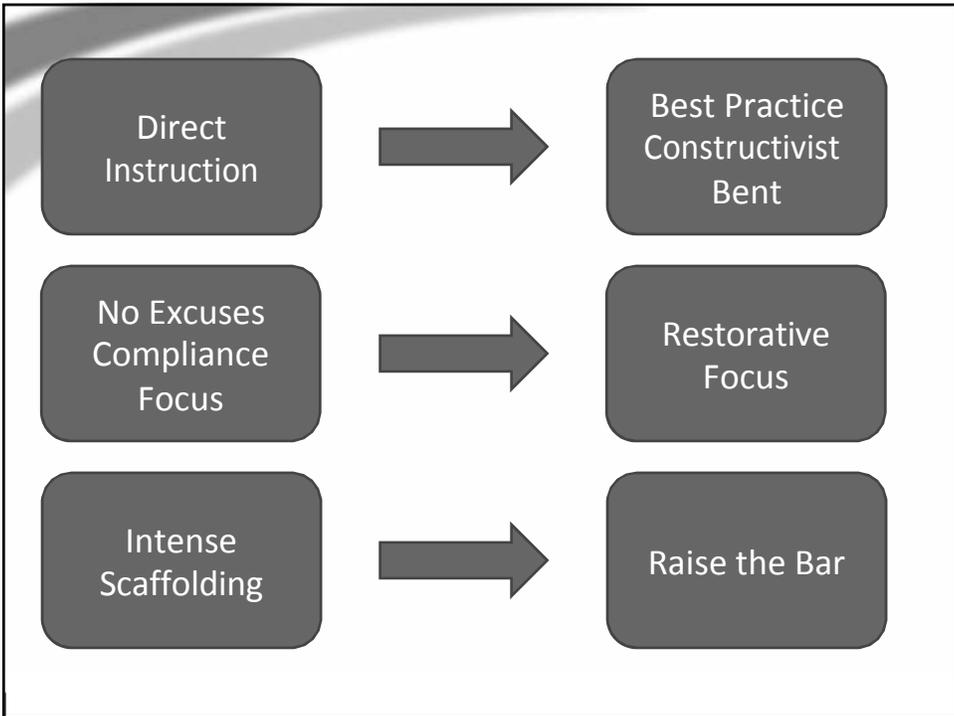
***Mastery Camden High School is due to open with a 9th grade class in the 2016-17 school year as an expansion of East Camden Middle School. The student population will largely come from East Camden Middle School but definite demographic data will not be available until the school year begins.

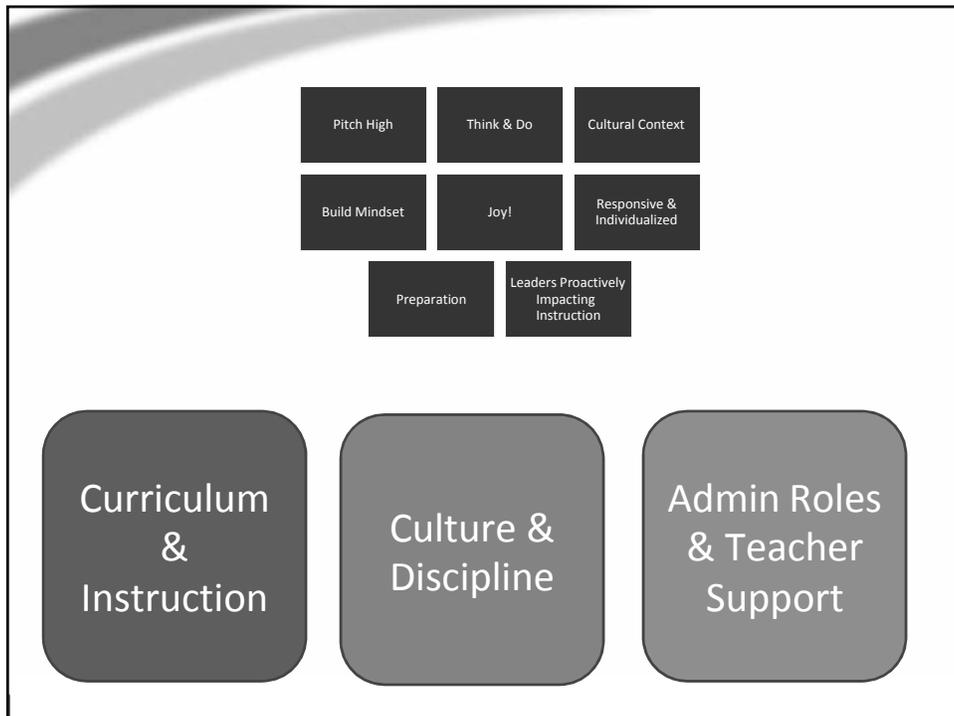
****Gillespie is due to open in 2017-18 as a new Mastery school. As such, there is no demographic data for students available yet but, as stated in our application, all new schools intentionally serve neighborhoods of students who are low-income and high-minority populations.

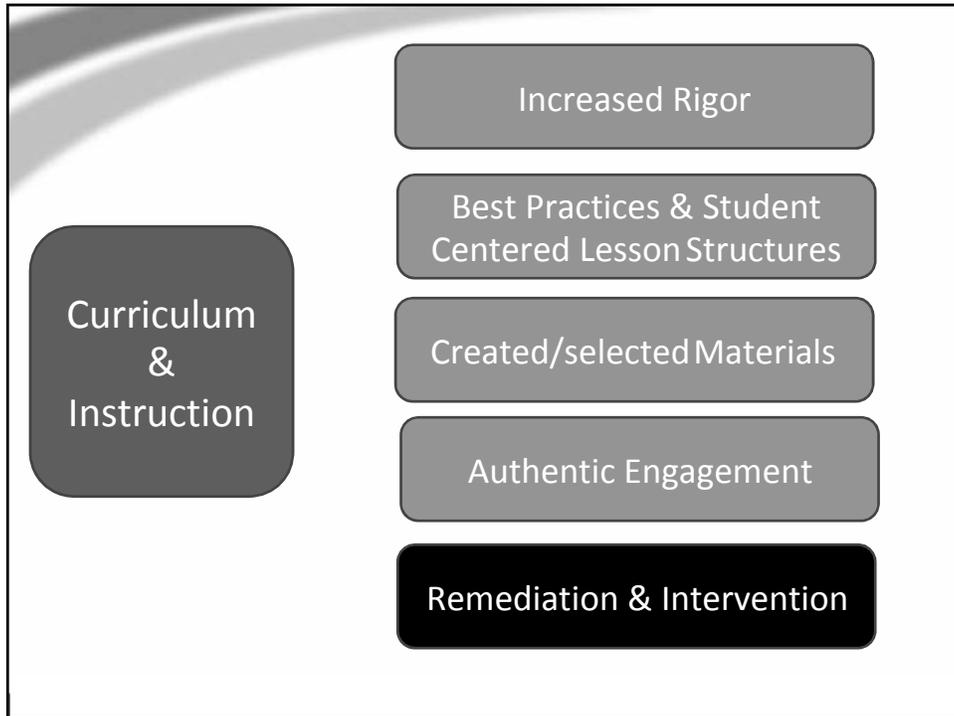
Mastery 3.0 Early Implementation

- **Built a framework to shift away from**
 - Direct Instruction
 - No Excuses Compliance Focus
 - Intensive Scaffolding
- **New framework introduced for Curriculum/Instruction, School Culture, Admin/Teacher Supports**

1









3.0 Early- 2016 forward aligned to new strategic plan

- **Continue focus on curriculum/instruction, culture & admin/teacher supports**
- **Prove out model using pilots & evaluation; real time data analytics**
- **Restructure academic team with direct School Support team as focus for instructional impace**

8

Mastery Network

Approved Vision – May 2016

Youth in the communities we serve learn the academic and personal skills they need to be truly prepared for postsecondary success and able to pursue their dreams.

4 potential paths were considered

A. System Change Phila/Camden Education Systems	B. Community Improve the communities we serve	C. Model Demonstrate Break-thru Urban District Model	D. Students Serve As Many Students As possible
<p>Change the education system for <i>all</i> kids in Philly</p> <p>↓</p> <p>Expand influence in Philly/Camden until all kids get a great education</p>	<p>Be a catalyst for social change in the communities we serve</p> <p>↓</p> <p>Develop community supports & services linked to our schools</p>	<p>Demonstrate a best-practice urban school district that serves all kids</p> <p>↓</p> <p>Iterate & improve our model. Grow as necessary & share what we learn</p>	<p>Serve as many students as possible in high-need communities</p> <p>↓</p> <p>Expand into new cities where Mastery can reach a critical mass of students</p>

10

Phase I Mastery Strat. Plan Priorities 2016-21 (1/4)

Strategy	Actions required
<div style="display: flex; align-items: center;"> <div style="background-color: #ccc; border-radius: 50%; width: 20px; height: 20px; display: flex; align-items: center; justify-content: center; margin-right: 5px;">1</div> <div style="background-color: #eee; padding: 5px;"> Prove out 3.0 program model </div> </div>	<ul style="list-style-type: none"> • Improve academic model <ul style="list-style-type: none"> - Effective 3.0 instruction across all subjects - Culturally responsive • Improve our school culture model <ul style="list-style-type: none"> - Build student mindset & SEL skills • Build out mental health & SpEd supports <ul style="list-style-type: none"> - Trauma interventions - RTII • Develop staffs' cultural competency • Revise high school program & post-secondary transition model <ul style="list-style-type: none"> - Successful pathways to college, 2 year, technical, trade, & the service

11

Phase I Priorities – 2016-2021 (2/4)

Strategy	Actions required
<div style="display: flex; align-items: center;"> <div style="background-color: #ccc; border-radius: 50%; width: 20px; height: 20px; display: flex; align-items: center; justify-content: center; margin-right: 5px;">2</div> <div style="background-color: #eee; padding: 5px;"> Build organizational systems </div> </div>	<ul style="list-style-type: none"> • Develop healthy, inclusive organizational culture <ul style="list-style-type: none"> - Staff retention metrics • Improve NST effectiveness • Effective Human Capital Systems • Robust teacher & leadership pipeline • Evolve NST capacity to support future growth required in Phase II

12

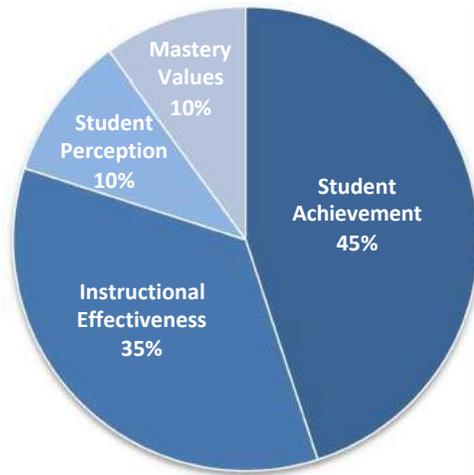
PERFORMANCE BASED TEACHER ADVANCEMENT SYSTEM

OVERVIEW

Mastery Charter School utilizes a performance based teacher advancement system. By basing advancement on performance rather than seniority, Mastery Charter Schools intends to attract, support, and retain the highest quality teachers and therefore provide our students with the best possible instruction. The system has four teacher categories, each with a specific advancement criteria, performance expectation, and salary range. The teacher categories are Associate, Senior Associate, Advanced and Master. Consistent with Mastery Charter Schools Values, the system strives to make the advancement standards, processes, and salaries fair and transparent.

ADVANCEMENT CRITERIA

There are four criteria areas that determine advancement:



Student Achievement

The Student Achievement criterion holds the most weight of 45% of the total Advancement Criteria factors. Student Achievement will be assessed by student growth measures – Mastery’s Value Added System (MVAS). While absolute measures such as pass rates, test scores, etc. are important, we believe that measures of growth are more valuable when evaluating teacher performance. MVAS focuses on how students are growing compared to historical performance data and other factors. When MVAS data is not available, other Mastery-wide growth and performance metrics will be used such as F&P growth, portfolio work, student learning goals, other student achievement growth metrics, etc.

MVAS

Mastery’s Value Added System (MVAS) is a statistical process that uses the gains that each student makes relative to their own individual test history to measure section and teacher performance. MVAS provides a view of teacher performance that is neutral to students' starting proficiency levels because each student's predicted test performance is tailored to that student’s individual history. This allows teachers the opportunity to show growth along the path to bringing a student to proficiency while fairly representing the starting point and varying challenges at different achievement levels. MVAS measures student achievement growth in four subjects – Literature/Reading and Math for grades 1-12 and History/Social Studies and Science for grades 3-12 at all non-first year campuses. MVAS for first year campuses will be rolled out in the school's second year.

Instructional Effectiveness

The Instructional Effectiveness criterion holds the weight of 35% of the total Advancement Criteria factors. Mastery’s Instructional Standards (IS) are the basis for our instructional model. The standards serve to create a common definition of instructional quality. Instructional Effectiveness will be assessed by a series of short (10-20 min), frequent (at least 15 per school year) teacher observations over the

course of the school year. The goals are to capture a robust picture of the teacher’s planning and instruction and provide the teacher with multiple opportunities to receive and incorporate feedback. More information on teacher observations is provided in the *Professional Development and Feedback* section of this Handbook.

Mastery Charter Schools Values, Contributions & Responsibilities

The Mastery Charter Schools Values criterion holds the weight of 15% of the total Advancement Criteria factors. We believe that in order to achieve our ambitious mission, all staff must uphold the Mastery Charter Schools values, fulfill their responsibilities and actively contribute to the school community.

Consequently, teachers will receive feedback regarding performance in:

- Upholding the Mastery Charter Schools Values in relationship to the Mastery Charter Schools community, including students, peers, administrators, and parents.
- Fulfilling the responsibilities described in this handbook as well as other reasonable requests made by their supervisor.
- Contributing to the success of the school especially when going above and beyond the expectation.

Student Perception

New to Mastery’s Teacher Advancement System this year, the Student Perception criterion holds the weight of 10% of the total Advancement Criteria factors. One of our 3.0 principles is “Build Mindset” and there is now research to substantiate that student mindset is a predictor of student learning. Student Perception will be measured by conducting student surveys twice per year – at Mid-Year and End of Year. The student survey data gives us insight into the experiences of our students and we’ve seen strong, positive correlations between positive responses to the survey questions and student growth.

REVIEWS

Mid-Year Feedback

The midyear conversation serves as a structured time for Managers to provide feedback and for employees to learn more about performance. The purpose of the conversation is developmental. Managers will highlight areas where an employee is doing well and where they need further development. These conversations are meant to reflect upon performance in the various Teacher Advancement System areas: Student Achievement, Instructional Effectiveness, Values, and Student Perception.

End-of-Year Evaluation

The purpose of the end-of-year (EOY) evaluation is to provide feedback to employees related to their performance throughout the year. During the EOY evaluation, managers will discuss all four areas of the Teacher Advancement System while providing strengths and development areas. Employees will receive their performance category and salary for the following year during this evaluation. Employees starting after January 1st will not be eligible for a merit increase.

PERFORMANCE CATEGORY GUIDELINES

For each of the advancement criterion, the teacher’s performance category informs what the specific expectations are for performance. The chart below details those expectations. The salary scale for this year is located in Appendix 3.

Teacher Performance Category Expectations				
Teacher Category	Criteria			
	*Student Achievement	Instructional Effectiveness	Mastery Values and Contributions	Student Perception
<i>Input</i>	<i>MVAS</i>	<i>Observations</i>	<i>Principal Rating</i>	<i>Student Surveys</i>
Associate	<p>“Meets Expectation” (3) or better Student achievement expectations met. Academic goals met.</p>	<p>In process of mastering Mastery’s instructional model. “Developing” (2) ratings or above with evidence of progress towards “Proficient” (3) – (at least one rating of “Proficient”)</p>	<p>Fulfills Mastery job responsibilities and acts consistently with Mastery’s values</p>	<p>Average of 3.5 or better</p>
Senior Associate	<p>“Meets Expectation” (3) or better Student achievement expectations met. Academic goals met.</p>	<p>Mastered Mastery’s instructional model. “Proficient” (3) ratings or above</p>	<p>Fulfills Mastery job responsibilities and acts consistently with Mastery’s values</p>	<p>Average of 3.7 or better</p>
Advanced	<p>“Exceeds Expectation” (4) or better Students demonstrate accelerated academic achievement on multiple and varied measures. Ambitious academic goals met.</p>	<p>Demonstrates Mastery’s instructional model at the “Advanced” (4) level for majority ratings – (one rating may be at the “Proficient” level)</p>	<p>Fulfills and frequently exceeds Mastery job responsibilities and exemplifies the Mastery’s values. Classroom and instruction are exemplary. Supports the success of other instructors.</p>	<p>Average of 3.9 or better</p>
Master	<p>“Exceeds Expectation” (4) or better Students demonstrate accelerated academic achievement on multiple and varied measures. Ambitious academic goals met.</p>	<p>Demonstrates Mastery’s instructional model at the “Outstanding” (5) level for majority of ratings – (one rating may be at the “Advanced” level)</p>	<p>An instructional leader that drives the Mastery mission and values. Displays consistent, significant and measured impact on the school’s performance through instruction, coaching, leadership and PD.</p>	<p>Average of 4.1 or better</p>

*Teachers of non-tested grades and subjects that do not have MVAS data will have other Student Achievement metrics as inputs, which will be determined by the Principal or Assistant Principal, in conjunction with the teacher, at the start of the school year. Teachers of subjects without MVAS will be expected to “Meet Expectations” of goals set each year. Student Achievement goals will become more ambitious as teachers advance towards the Master category.

Additionally, special education teachers who case manage should refer to Mastery’s *Special Education Case Management Model and Evaluation System* document for details on performance evaluation.

Mastery Charter Schools is committed to ensuring that our Teacher Advancement System is fair, consistent and easy to understand. By following the guidelines that are set forth above:

- If you do not meet performance category expectations, you can expect to receive the minimal increase for the year or a salary increase below the average increase (additional measures, such as non-renewal of contract, may be taken as mentioned below in the *End-of-Year Decision Guideline* section)
- If you meet all performance category expectations, you can expect to receive an average salary increase (depending on current placement in the range)
- If you exceed performance category expectations, you can expect to receive a percentage increase amount that is above the average increase (other factors considered such as position in the salary range) or promotion to the next category, if eligible

Mastery Charter Schools will set average salaries and minimal increase amounts each year. The amounts will be based on business, economic and market conditions.

END-OF-YEAR DECISION GUIDELINES

Teacher						
<i>Renewal Outcomes</i>	<i>Criteria</i>	<i>Salary Guideline</i>	<i>Student Achievement</i>	<i>Instructional Quality</i>	<i>Mastery Values and Contributions</i>	<i>Student Perception</i>
Teacher Category Promotion	<i>Meets the criteria for promotion in all areas.</i>	<i>Teachers promoted to a new category will be placed at the beginning of the category salary scale.</i>	<i>Meets student achievement criteria described by promoted category level.</i>	<i>Observation performance is always at the promoted category level.</i>	<i>Always meets the described performance level for Mastery values at the promoted category level.</i>	<i>Student Survey data meets or exceeds the average score required for the promoted level</i>
Salary Raise	<i>Meets the criteria for current level and exceeds criteria in some areas.</i>	<i>Teachers who meet all criteria for the category will be placed towards the middle of the salary range. Teachers who exceed in most areas but have not met the criteria for promotion to the next level will be placed at the higher end of the salary range.</i>	<i>Meets student achievement criteria described by promoted category level.</i>	<i>Observation performances are mixed, with some scores at the next higher category level and others at the existing category level.</i>	<i>Meets, and often exceeds, the described performance level for Mastery values at the current category level.</i>	<i>Student Survey data meets, and may exceed, the average score required for the current category level.</i>
Minimal Increase	<i>Usually, but not always, meets the criteria for the current level.</i>	<i>Teachers who are struggling to meet all criteria for the category will receive a minimal increase.</i>	<i>Makes limited progress toward academic goals for students.</i>	<i>Observation performance is at the current category level and/or some scores may be below expectation.</i>	<i>Meets the described performance level for Mastery values at the current category level.</i>	<i>Student Survey data meets average score required for current category level and/or may be below expectation.</i>

Non-Renewal of Contract

Generally, a teacher will have received warnings and/or a professional improvement plan before a decision to non-renew is made. Please see Performance Improvement Process.

***NOTE: Teachers starting after January 1st will not be eligible for an end of year increase.*

Teacher Incentive Fund

The Teacher Incentive Fund (TIF) supports efforts to develop and implement performance-based teacher and principal compensation systems in high-need schools. Mastery Charter Schools has been awarded the TIF grant and is able to implement the above system because of the awarded funds.

Goals include:

- Improving student achievement by increasing teacher and principal effectiveness;
- Reforming teacher and principal compensation systems so that teachers and principals are rewarded for increases in student achievement;
- Increasing the number of effective teachers teaching poor, minority, and disadvantaged students in hard-to-staff subjects; and
- Creating sustainable performance-based compensation systems.

Additionally, the TIF grant supports Mastery Charter Schools' expansion efforts, it covers annual increases for new campuses and it allows Mastery Charter Schools to share best practices across organizations in an effort to improve systems.

CONTRACTS (10½ MONTH STAFF MEMBERS)

Contract Signing

In May, teachers are given notice of contract renewal decisions. In order to hold a position, contracts must be signed and returned within seven days of receiving it. Reneging on a signed contract may result in the loss of accrued benefits and the annual bonus described in the contract (if applicable), immediate termination of health benefits coverage, and ineligibility for rehire.

Mastery Charter Schools agrees to notify the Employee of contract renewal decision by May 15th of the current school year. The Employee agrees to notify Mastery Charter Schools of his/her contract renewal decision within seven (7) days of receiving the new contract; if no timely response is provided, the offer will be considered withdrawn.

Non-Renewal of Contract

Mastery Charter Schools may, in its sole discretion, elect not to offer a new contract for the following school year. If Mastery Charter Schools decides not to renew a contract because the teacher's evaluations have been unsatisfactory, the teacher may not be offered a contract for the following school year. To ensure decisions based on unsatisfactory performance are not capricious, the following procedures will generally be followed:

- The teacher will generally receive a warning regarding unsatisfactory performance.
- A warning letter will generally be offered with notice that performance is unsatisfactory and that a teacher's current position or contract offer for the following year is in jeopardy. An Improvement Plan may be offered, with the second warning, which makes improvement expectations clear. The plan will generally offer supports to the teacher in meeting the expectations. Mastery Charter Schools' Human Resource Director and CAO or Regional Director may be notified.

- A written evaluation of the Improvement Plan may be created. The evaluation may state whether the goals of the Improvement Plan have been met.

**Teachers hired after January 1st of the current school year are not subject to the above guidelines set forth in the non-renewal process. Teachers hired after January 1st are not eligible for an End of Year Increase and summer pay will be prorated based on time worked. Should an employee hired after January 1st have performance concerns, the employee can be terminated and/or non-renewed for the upcoming school year without the full process above being followed.*

Note: this process does not apply in cases where the teacher's actions have violated the law, placed students or staff in danger, or otherwise violate employment regulations that constitute grounds for immediate dismissal.

APPEALS OF SALARY DETERMINATION

A teacher who feels his/her salary placement has not been determined consistently with the above guidelines, should first discuss these concerns with his/her School Leader within three business days of the End of Year Conversation. If the matter is not resolved with the School Leader, the teacher should contact Human Resources and request that Human Resources review the salary determination. Human Resources will require that the teacher state in writing the reason they believe the salary placement guidelines have not been followed appropriately. Teachers must submit written concerns within three days of notice to Human Resources. Any appeal request that has not followed the appropriate timeline will not be considered by Human Resources. Human Resources will review the evaluation data and discuss the matter with the School Leader. Human Resources will make a recommendation and review the recommendation with the CFO. The final decision will be presented to the teacher within five business days of receiving written request.

PERFORMANCE IMPROVEMENT PLAN

PROCESS

Where the Principal determines that the teacher's performance is not satisfactory, the School may terminate the Employment Contract. Prior to such a determination, the School will generally give the Employee notice of his/her unsatisfactory performance and the opportunity to improve his/her performance. Notice shall include:

- Written notice
- Improvement Plan
- Evaluation of Improvement Plan

Opportunities to improve performance shall include coaching, observations, in-class support, and/or modeling.

***Teachers hired after January 1st of the current school year are not subject to the process outlined above.*

OUTCOMES

At the conclusion of a performance improvement plan (PIP), there are four possible outcomes:

1. The employee will have met the goals of the PIP and will be awarded a contract for the following year.
2. The employee will not have met the goals of the PIP and will be put on another PIP cycle.
3. The employee will not have met the goals of the PIP and will not be awarded a contract for the following year.

4. The employee will not have met the goals of the PIP and the employee’s contract will be terminated immediately.

TEACHER LOAD AND COMPENSATION

OVERVIEW OF CONTRACTED LOADS

The Employee’s job duties shall include those delineated in the job description corresponding to the Employee’s title. These duties shall include, but are not limited to: **Instruction and Support, Professional Responsibilities, Saturday School, and Parent and Community Support.** The **Instruction and Support** duties are collectively described as ‘On Time’.

ADDITIONAL ‘ON TIME’ COMPENSATION

Teachers will be compensated for teaching in excess of contracted minutes in increments of 15 minutes (per day or week) at a rate of \$500 (per day or week). Please refer to your contract for the specific maximums.

Position	Weekly 'On		Daily	Self-	Non Self-
Secondary Regular Ed	1475	330	330	N/A	N/A
Elementary Regular Ed	1585	325	N/A	N/A	N/A
Secondary Special Ed	1585	330	N/A	12	50
Elementary Special Ed	1585	325	N/A	12	50

ADDITIONAL CASELOAD COMPENSATION

Teachers will be compensated at a rate of \$900 for every one case they are over the maximum allotment in his/her contract. Please refer to your contract for the specific maximums.

Case management includes student support, IEP management, parent contact, and other responsibilities.

- For self-contained classrooms, teachers manage all cases within their population in addition to general instructional/support workload. Maximum number of cases = 12.
- For non-self-contained classrooms, case management can replace instruction and support at an exchange rate of 30 minutes/week per 1 case. Maximum number of cases = 50 (See *Additional ‘On-time’ Compensation* for additional compensation rate for non-self-contained classrooms).

Teacher Report Reference

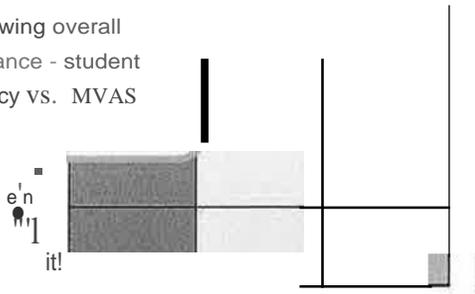
Report Summary - Page 1

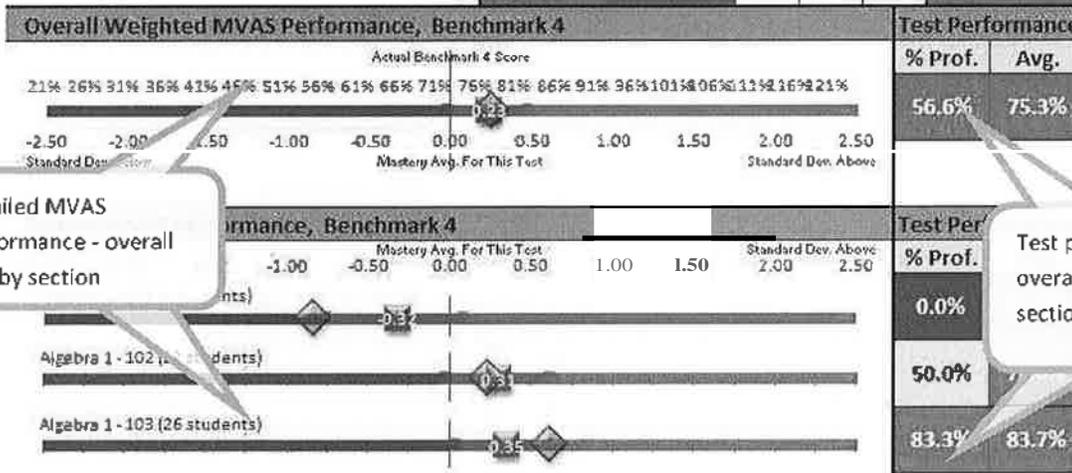
MVAS Teacher Report
Linda Leonard (ABC Campus)
Math - Benchmark 4

One report is created for each teacher and subject. Teachers who teach multiple subjects will receive multiple reports



Mastery Charter Schools
Excellence. For Everyone.

Your Overall Performance	Key Performance Metrics, Year-to-date														
<p>Grid showing overall performance - student proficiency vs. MVAS growth</p>  <p style="text-align: center;">75+ % Overall Proficiency Rate - BM4</p>	<p>VRO% of proficient students on SMs 79.8%</p> <p style="text-align: center;"><i>Goal = 75%+ of your students at proficient or above</i></p>														
	<p>Avg. score of your students on all BMs 85.4%</p> <p style="text-align: center;"><i>Proficient • on track for</i></p>														
	<p>MVAS growth for each BM and YTO students' growth compared to ex</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>BM1</th> <th>BM2</th> <th>BM3</th> <th>BM4</th> <th>BM5</th> <th>BM6</th> <th>2009-10</th> </tr> </thead> <tbody> <tr> <td>Excds</td> <td>Excds</td> <td>Meets</td> <td>Meets</td> <td>19-Apr</td> <td>10-Jun</td> <td>Exceeds</td> </tr> </tbody> </table>	BM1	BM2	BM3	BM4	BM5	BM6	2009-10	Excds	Excds	Meets	Meets	19-Apr	10-Jun	Exceeds
	BM1	BM2	BM3	BM4	BM5	BM6	2009-10								
Excds	Excds	Meets	Meets	19-Apr	10-Jun	Exceeds									
<p>Summary of key performance metrics - raw test scores and MVAS growth</p>															



Legend

MVAS Performance Charts	MVAS Growth Tiers
	<p>Exceeds - exceeded expected MVAS growth</p> <p>Meets - met expected MVAS growth</p> <p>Below - below expected MVAS growth</p>

generated for the [redacted] report

Report Summary - Page 2

Each student's test forecast for this benchmark Prediction reports will show only standard deviations, result reports will show score and standard deviation. The forecast is based on each student's test history.

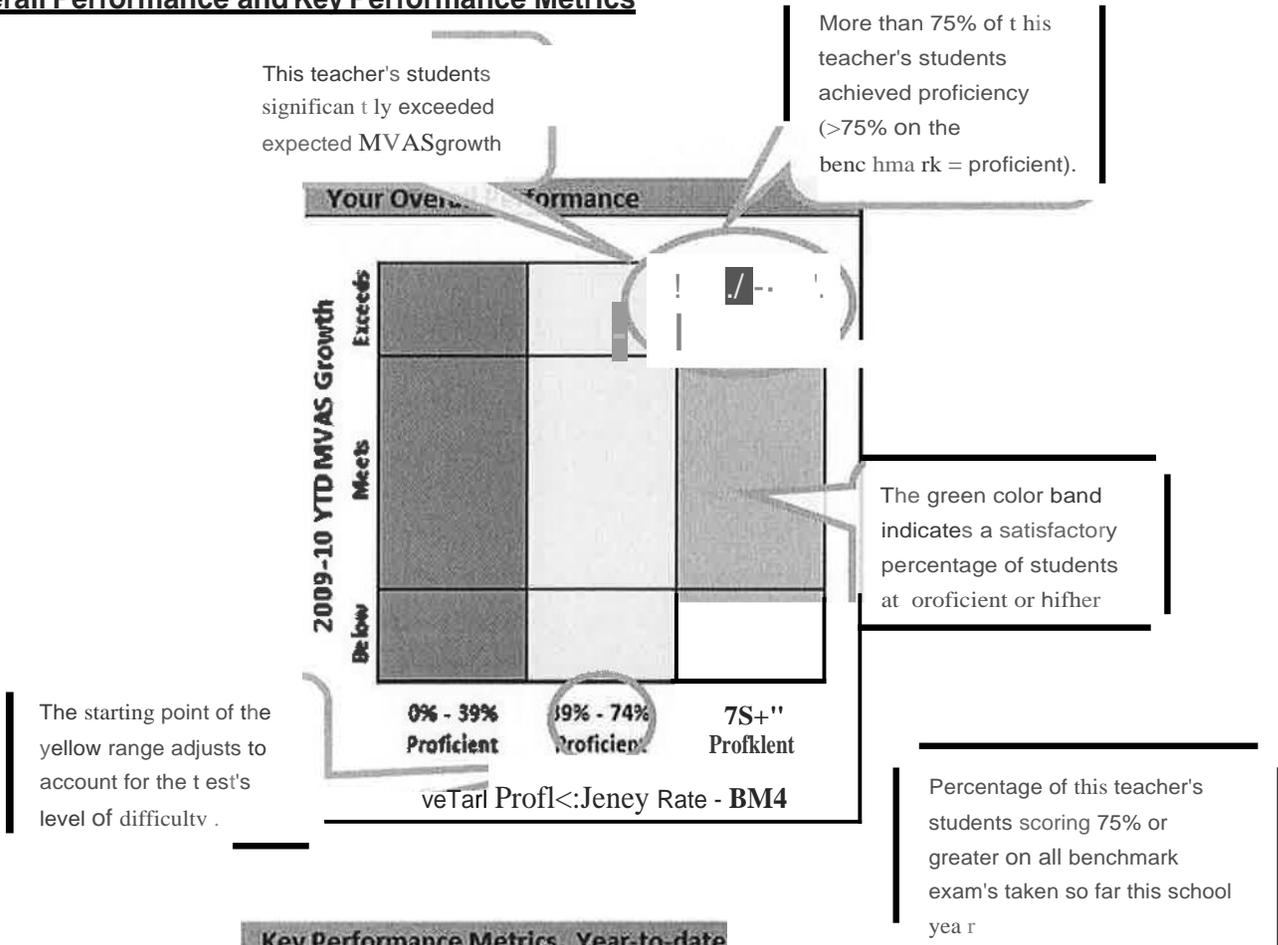
Each student's MVAS growth tier by report period

Each student's overall YTD MVAS growth tier

		Forecast	Actual	MVAS Growth By BM	MVAS YTD
		77% (0.27 SD)	66%		Exceeds
		48% (-1.13 SD)	43%		Meets
		76% (0.26 SD)	54%		Exceeds
			Not Taken		Meets
Trudell, P	Algebra 1 • 101	64% (-0.34 SD)	49%		Meets
Hass, C	Algebra 1 • 101	63% (-0.40 SD)	60%		Meets
Otoole, B	Algebra 1 • 101	65% (-0.32 SD)	66%		Exceeds
Silliv, A	Algebra 1 • 101	51%	34%		Meets
Milik, G	Algebra 1 • 101	63%	63%		Meets
Minhenv, V	Algebra 1 • 101	63% (-0.75 SD)	89%		Exceeds
Oelecur, R	Algebra 1 • 101	63% (-1.18 SD)	71%		Meets
Green, T	Algebra 1 • 101	45% (-0.50 SD)	60%		Exceeds
Hall, J	Algebra 1 • 101	49% (-0.50 SD)	74%		Meets
Madrill, T	Algebra 1 • 101	60% (-0.50 SD)	Not Taken		Exceeds
Cortel, L	Algebra 1 • 101	66% (-1.90 SD)	66%		Meets
Weston, R	Algebra 1 • 101	66% (-0.75 SD)	89%		Exceeds
Ooty, H	Algebra 1 • 102	6 (-0.32 SD)	49%		Meets
Stott, N	Algebra 1 • 102	Not Taken	Not Taken		Meets
Heves, A	Algebra 1 • 102	7m (0.29 SO)	77%		Meets
Romano, T	Algebra 1 • 102	77ft (0.29 SO)	74%		Meets
Mason, B	Algebra 1 • 102	74to (0.12 SO)	69%		Meets
Oejesus, J	Algebra 1 • 102	7 (0.39 SO)	83%		Exceeds
Jeck, A	Algebra 1 • 101	58% (-0.68 SO)	60%		Meets
Silliv, T	Algebra 1 • 102	60% (-0.15 SO)	81%		Meets
Bolton, A	Algebra 1 • 102	86% (-0.73 SO)	97%		Meets
Coon, J	Algebra 1 • 102	IS" (0.68 SO)	94%		Exceeds
Cardon, G	Algebra 1 • 102	83 (0.58 SO)	91%		Exceeds
Horton, E	Algebra 1 • 102	11% (0.75 SO)	66%		Meets
Rodrigues, K	Algebra 1 • 102	7.2 (0.15 SO)	SM		Meets
Fournier, M	Algebra 1 • 102	83 (0.61 SO)	9H		Exceeds
Mitchell, R	Algebra 1 • 103	60% (-0.45 SO)	S9		Exceeds
Cushin, C	Algebra 1 • 103	60% (-0.15 SO)	94%		Meets
Ookey, J	Algebra 1 • 103	8391 (0.57 SO)	86%		Meets
O'Neil, Z	Algebra 1 • 103	84 (0.83 SO)	86%		Meets
Woods, A	Algebra 1 • 103	70% (-0.04 SO)	97%		Exceeds
Butler, H	Algebra 1 • 103	68% (-0.16 SO)	83%		Exceeds
Saunders, D	Algebra 1 • 103	86% (0.72 SO)	91%		Meets
Osh, G	Algebra 1 • 103	82% (0.5 SO)	Not Taken		Meets
Frederic, KA	Algebra 1 • 103	83% (0.58 SO)	S9*		Meets
Ontiveros, M	Algebra 1 • 103	134 (0.09 SO)	96%		Exceeds
Ofal, H	Algebra 1 • 103	8 COS4 SO)	S7%		Meets
Elm, T	Algebra 1 • 103	8 S6tt i=0.26 SD)	83		Meets
Joyner, D	Algebra 1 • 103	72 (0.01 SO)	69%		Meets
Wentworth, A	Algebra 1 • 103	116 (0.6 SO)	80%		Meets
Jonson, E	Algebra 1 • 103	Not Taken	Not Taken		Exceeds
Blaug, S	Algebra 1 • 103	20% (0. SO)	74%		Exceeds
Gifford, A	Algebra 1 • 103	78 (0.36 SO)	83%		Exceeds
Oay, P	Algebra 1 • 103	m (0.30 SO)	77%		Meets
Goodwin, M	Algebra 1 • 103	8154 (0.119 SO)	91%		Meets
Williamson, A	Algebra 1 • 103	83 (0.57 SO)	97%		Meets
Swain, M	Algebra 1 • 103	74 (0.12 SO)	71%		Meets
Johnson, J	Algebra 1 • 103	80% (0.13 SO)	91%		Meets
Dillon, L	Algebra 1 • 103	76% (0.26 SO)	77%		Meets
Minn, O	Algebra 1 • 103	75% (0.1 SO)	80%		Exceeds

Each student's actual score on the benchmark (only shown on scoring report)

Overall Performance and Key Performance Metrics



Key Performance Metrics, Year-to-date

YTD% of proficient students on 8Ms	79.8%
Goal • 75% of our 10th hrs or p, o/ cl nr or ob OIM	
Avg score of your students on all 8Ms	85.4%
Proficient .. Millmark, ob Ovt-15'9	

Weighted average score on all benchmarks taken so far this school year for all of this teacher's students across all of their sections

MVAS growth for each B Mand VTO, measuring your students' growth compared to expected growth

MVAS growth for each reporting period	BM1	BM2	BM3	BM4	BMS	BM6	2009-10	Year-to-date MVAS growth
	Excds	Excds	Meets	Meets	29-Apr	10-Jvo	Exceeds	

Most Recent Benchmark MVAS Performance

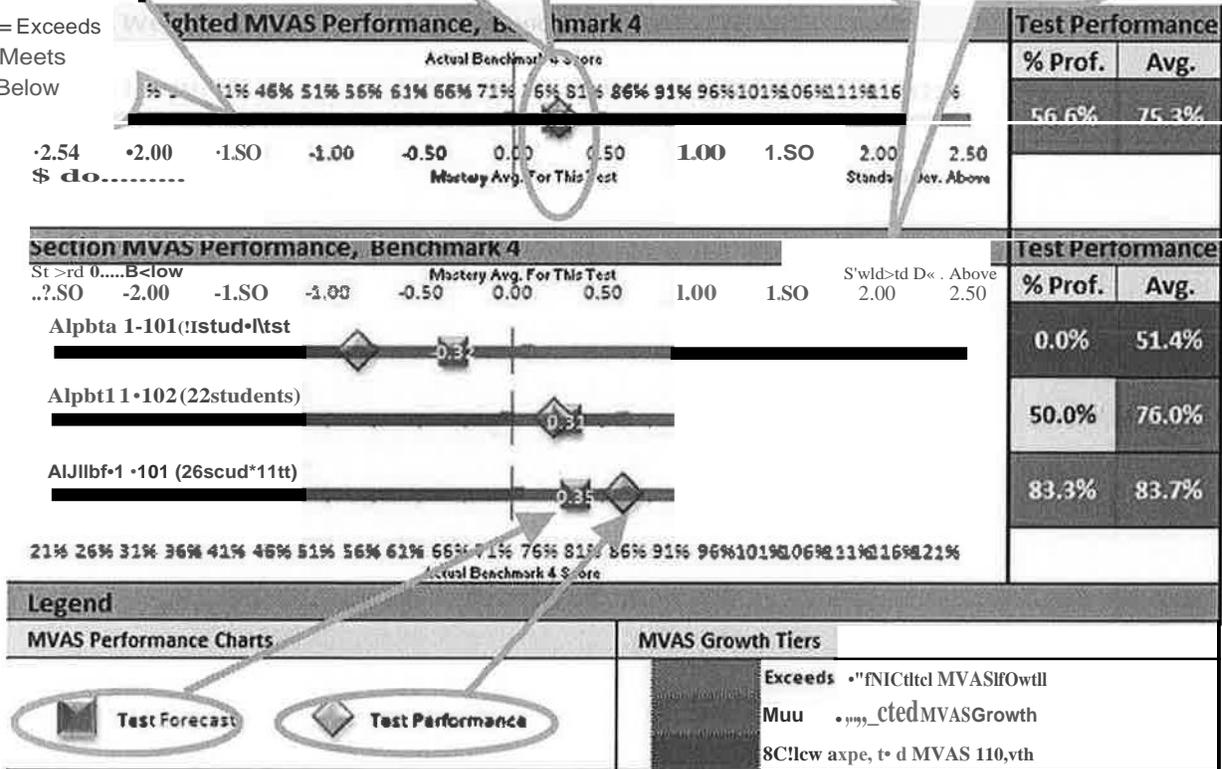
The colors on the line charts represent the MVAS growth tiers

Green = Exceeds
Blue = Meets
Red = Below

0.00 standard deviations = Mastery average

On this benchmark, Mastery average was approximately 78%

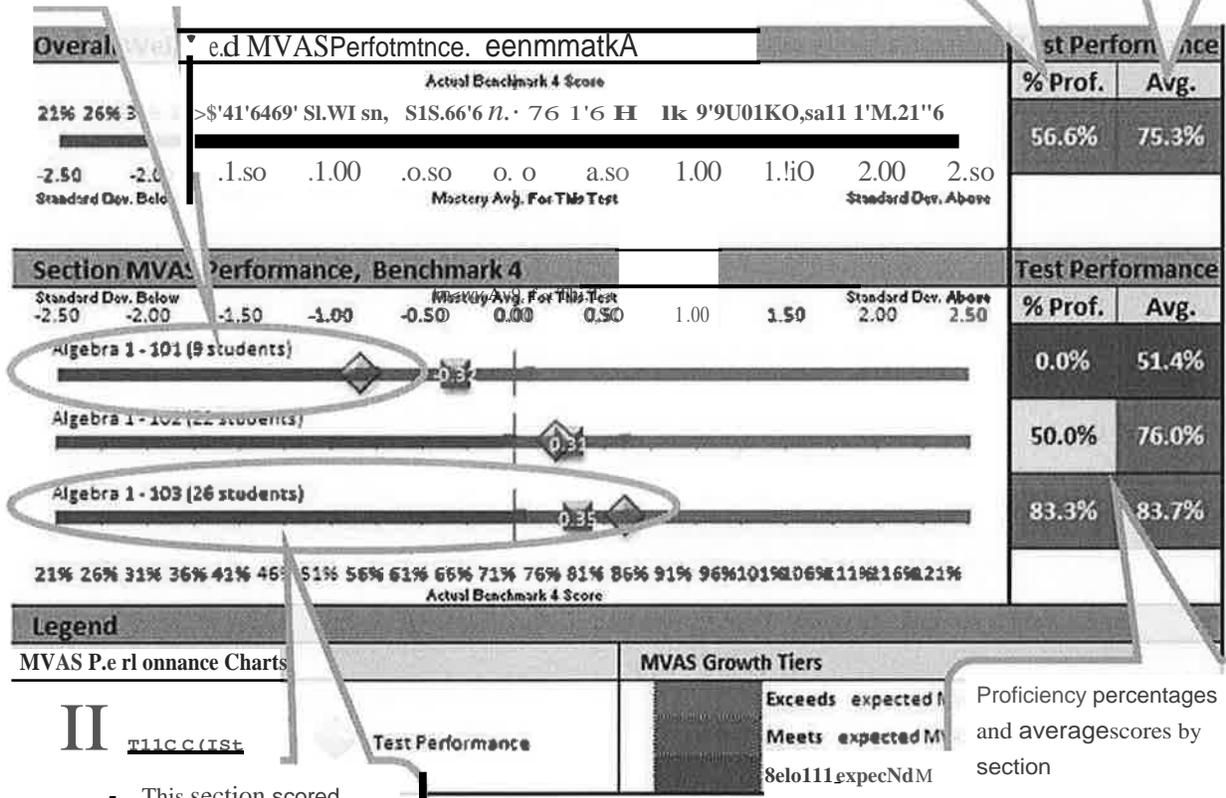
Because each benchmark is different, scores are based on the number of standard deviations above or below the Mastery average.



This section scored below their MVAS prediction on the most recent exam

Percentage of students scoring greater than 75% on most recent BM exam

Average score of students on most recent BM exam



This section scored above their MVAS prediction on the most recent exam

Proficiency percentages and average scores by section



Teacher Goals Student Achievement Metrics & Ratings

STUDENT ACHIEVEMENT METRICS CHART

COMMON ASSESSMENT GOALS (CAG)

STUDENT LEARNING GOALS (SLG)

NEW SCHOOLS – COMMON ASSESSMENT GOALS (CAG)

ASSIGNING STUDENT ACHIEVEMENT RATINGS FOR NON-MVAS SUBJECTS

STUDENT ACHIEVEMENT METRICS CHART

Subject	K	1	2	3	4	5	6	7	8	9	10	11	12
Reading/Lit	CAG	MVAS											
Math	CAG	MVAS											
History/Soc St	SLG	SLG	SLG	SLG		MVAS		MVAS	SLG	MVAS	MVAS	MVAS	MVAS
Science	SLG	SLG	SLG	SLG	MVAS		MVAS	SLG	MVAS	MVAS	MVAS	MVAS	MVAS
Writing/Comp				CAG									
Enrichment	SLG	SLG	SLG	SLG	SLG	SLG	SLG	SLG	SLG	SLG	SLG	SLG	SLG
Spanish	SLG	SLG	SLG	SLG	SLG	SLG	SLG	SLG	SLG	CAG	CAG	CAG	CAG
Interventions	CAG	CAG	CAG	CAG	CAG	CAG	CAG	CAG	CAG	CAG	CAG	CAG	CAG
Case Management	IEP	IEP	IEP	IEP	IEP	IEP	IEP	IEP	IEP	IEP	IEP	IEP	IEP

COMMON ASSESSMENT GOALS (CAG)

Common Assessment Goals (CAG) should be utilized as the Student Achievement metric for TAS when MVAS is not available and there are common assessments used to evaluate student performance. Below is a list of CAGs by subject and/or grade level.

Subject	Common Assessment Goals
Reading/Lit (K)	<ul style="list-style-type: none"> • Kinder - 75% of kids on level C by RP3 (level D by EOY)
Math (K)	<ul style="list-style-type: none"> • By the end of RP3, 90% of students are able to count a scattered configuration of objects up to and including 15. • By the end of RP3, 90% of students are able to compare the number of objects in two groups or written numerals 1-10. • By the end of RP3, 90% of students are able to solve addition and subtraction word problems within 10. <p>Questions: please reach out to Andrea Oettinger at [REDACTED] (and copy your HRD).</p>
Writing Comp (3-8)	<ul style="list-style-type: none"> • By the end of RP3, 75% of kids on grade level OR 1.5 years of growth from baseline to end of RP3 <p>Questions: please reach out to Jasmine Landry at [REDACTED] (and copy your HRD).</p>
Comp 9	<ul style="list-style-type: none"> • By the end of RP3, 90% of students will conduct quality research independently outside of class time • By the end of RP3, students' rubric scores increase 1.5 points (or more) on average for both timed writing and published writing <p>Questions: please reach out to Kristen Davidse at [REDACTED] (and copy your HRD).</p>
Spanish 9-12	<ul style="list-style-type: none"> • Set individually with school leaders based on previous year's results on benchmarks
Literacy Interventions	<ul style="list-style-type: none"> • 75% of students achieve grade level equivalency or make 1.125 years of growth by RP3 <p>Questions: please reach out to Elizabeth Farruggia at [REDACTED] (and copy your HRD).</p>
Math Interventions	<ul style="list-style-type: none"> • Set individually with school leaders • Recommended: 75% of students are proficient or pass program based assessments by end of RP3 <p>Questions: please reach out to Elizabeth Farruggia at [REDACTED] (and copy your HRD).</p>
ESL	<ul style="list-style-type: none"> • Use MODEL assessment to set goals for students <p>Help/Questions: please reach out to Kinyta Smalls at [REDACTED]</p>

STUDENT LEARNING GOALS (SLG)

Student Learning Goals (SLGs) are used for subject areas where this is not a common curriculum and goals vary by content and level. This includes Enrichment subjects (Art, Music, PE, Technology, Elementary Spanish), Science K-3, Social Studies K-3, SEL and Elective classes.

- The SLG process **establishes learning goals** for students in a specific content and grade level
- SLG's create a **common agreement** between teacher and admin which clearly defines what teacher will be evaluated on in regards to student learning
- Reinforces the process of **monitoring and evaluating** students' progress toward achieving goals

Go to this link for access to template and writing guide for SLGs: http://portal/apps/view_items.cfm?MenuID=5518&CategoryID=2

NEW SCHOOLS – COMMON ASSESSMENT GOALS (CAG)

New schools do not have MVAS in their first year. Therefore, any subject area which would typically have MVAS for Student Achievement (list below) should use **Common Assessment Goals (CAG)** instead. The updated goals will be on the teacher goals trackers by Tuesday, September 22.

ASSIGNING STUDENT ACHIEVEMENT RATINGS FOR NON-MVAS SUBJECTS

In preparation for End-of-Year (EOY) performance reviews for teachers, administrators will need to enter Student Achievement ratings for the non-MVAS grades/subjects listed above into eSchool. Directions for logging into TAC and entering ratings can be found on the portal here: http://portal/apps/view_items.cfm?MenuID=5518&CategoryID=5. The Student Achievement gradebook will not list teachers who teach MVAS subjects, only teachers of non-MVAS subjects. MVAS scores will populate on the MY/EOY forms for teachers who teach subjects with MVAS. You can also view MVAS reports for these teachers in your school's MVAS folder on the *Reports & Dashboard* page on the portal. Student Achievement ratings for teachers of non-MVAS grades/subjects are not required until RP3; Enrichment teachers who complete new SLGs each RP should have a score for each RP; otherwise, student achievement ratings are required for RP3 only.

Here are the rating scales:

MVAS	
Tier	Description
Tier 5	Significantly Exceeds Students performed much better on their benchmarks than we would expect given the students' past test history
Tier 4	Exceeds Expectations
Tier 3	Meets Expectations Students performed about the same on their benchmarks as we would expect given the students' past test history
Tier 2	Near Expectations
Tier 1	Below Expectations Students performed much worse on their benchmarks than we would expect given the students' past test history

NON-MVAS (SLGs, CAGs, Other)	
Rating	Description
5	Significantly Exceeds
4	Exceeds Expectations
3	Meets Expectations
2	Near Expectations
1	Below Expectations

Case Manager IEP Goals	
Rating	Description
5	Significantly Exceeds Students on your caseload demonstrate an average of at least 90% of progress towards IEP goals by end of RP3
4	Exceeds Expectations Students on your caseload demonstrate an average of at least 80%-89% of progress towards IEP goals by end of RP3.
3	Meets Expectations Students on your caseload demonstrate an average of at least 70%-79% of progress towards IEP goals by end of RP3.
2	Near Expectations Students on your caseload demonstrate an average of at least 50%-69% of progress towards IEP goals by end of RP3.
1	Below Expectations Students on your caseload demonstrate an average of at least 0%-49% of progress towards IEP goals by end of RP3.

Instructional Standards 2015-16

What are the Instructional Standards?

The Instructional Standards are a compilation of best teaching practices, successful teacher traits and common measures of student success. Each standard is designed to create an effective, rigorous and joyful classroom experience that will serve to prepare students for higher education, the global economy and the pursuit of their dreams.

How are the Instructional Standards organized?

The instructional standards are organized into four standards. The first standard, Instructional Foundations, captures the most basic and foundational aspects of instruction. Without these teacher actions and student outcomes in place, the classroom cannot be safe or effective. The second and third standards, Rigorous Instruction and Classroom Culture, describe the traits of an effective classroom where daily learning happens at a high level. The final, fourth standard, Student Centered and Differentiated, describes a truly excellent classroom in which all students meet exceptional outcomes.

Within each standard, there are strands describing student outcomes and teacher actions. The most important strands of each standard are the student outcomes. If students are truly displaying the outcomes in those descriptors, especially as you move through the standards, transformational learning is taking place. The document outlines an order of operations in which Foundations are mastered first prior to focusing on Rigorous Instruction and Classroom Management. Additionally, strands within Student Centered and Differentiated should be the focus as a teacher has moved towards mastering the first three standards. The strands in the final standard are nuanced and difficult to effectively implement and are seen in our most effective classrooms.

How are the Instructional Standards used?

The Instructional Standards are used as a vision for teaching at Mastery and therefore are the basis for all professional development, feedback, coaching, support and evaluation. Teachers are given regular feedback on different aspects of the Instructional Standards through walk throughs and observations. Additionally, school administrators and central academic team members build PD and coaching plans around different areas of the standards depending on teacher need.

Evaluation: The following charts describe how performance on the instructional standards translates into evaluation. Teachers receive multiple short observations to determine where they fall in the descriptions below. The "Overall" outlines the spirit of each score while the standards descriptors provide more technical scoring details.

	Unsatisfactory	Developing	Proficient	Advanced	Outstanding
Overall	Classroom is unproductive and learning is minimal.	Classroom is productive and the spirit of the Instructional Foundations standard is being met.	Classroom is productive and appropriate learning is occurring. The Instructional Foundations standard is consistently and solidly being met. Teacher is meeting the overall spirit of both Rigorous Instruction and Classroom Culture standards. While minor areas of focus in each of those standards may exist, they are not significantly holding back student learning.	Classroom is strong and very productive. Impressive learning is occurring. Instructional Foundations are flawless and teacher is an exemplar of the Rigorous Instruction and Classroom Culture Standards. Classroom reflects strong execution of some of the strands of the Student Centered & Differentiated Standard.	Classroom is always impressively effective and producing exceptional student growth. Instructional Foundations are flawless and teacher is an exemplar of the Rigorous Instruction and Classroom Culture Standards. Classroom exemplifies the spirit of Student Centered & Differentiated, with many strands standing out as teacher/classroom strengths.
Instructional Foundations	Zero to some strands met	Most to all strands met	All strands met	All strands met	All strands met
Rigorous Instruction	n/a	Some strands met	Several to most strands met	Most to all strands met	All strands met
Classroom Culture	n/a	Some strands met	Several to most strands met	Most to all strands met	All strands met
Student Centered & Differentiated	n/a	n/a	n/a	Some strands met	Most to all strands met

Instructional Standards

At a Glance

	Instructional Foundations	Rigorous Instruction	Classroom Culture	Student Centered & Differentiated
Student Outcome	<ul style="list-style-type: none"> • On Task 	<ul style="list-style-type: none"> • Student Growth • High Level Student Response • Think and Do • Accountable Talk 	<ul style="list-style-type: none"> • Culture of Persistence • Productive Interactions 	<ul style="list-style-type: none"> • Exceptional Student Growth • Student Leadership & Voice
Teacher Actions	<ul style="list-style-type: none"> • Warm/Strict Tone • Clear Directions & Expectations • Monitoring, Reinforcement & Redirection • Appropriate Lesson • Accurate Content • Classroom Environment 	<ul style="list-style-type: none"> • Preparation • Rigorous Learning Outcome • Rigorous and Focused Questioning • Actively Facilitate Learning • Solidify Student Learning • Assignment & Assessment 	<ul style="list-style-type: none"> • Purpose & Rationale • Urgency & Goal Orientation • Engaging Approach • Build Mindset • Rapport & Proactive Relationship Building • Create Social Belonging 	<ul style="list-style-type: none"> • Strategically Responsive • Student Feedback, Coaching & Support • Planned Differentiation • Responsive Community Building • Professional Engagement & Innovation

Instructional Foundations: The foundations of a functional and productive classroom are consistently evident. In order to instruct rigorously, build authentic and meaningful relationships and ensure learning, the following foundations must exist.

Strand	Description
ON TASK	≥95% of students are meeting basic behavior expectations, engaged and executing the task at hand. Students consistently follow teacher directions. Students do not have phone, food, drinks or other non-essential distractors.
WARM/STRICT TONE	Teacher tone conveys patience, calmness, professionalism and respect through all interactions. Teacher does not raise his/her voice, use sarcasm or speak negatively with students but is appropriately firm, straightforward, and clear when redirecting behavior or clarifying expectations.
CLEAR DIRECTIONS & EXPECTATIONS	Teacher clearly and efficiently communicates directions and expectations for student work and behavior. Procedures are efficient, orderly and maximize instructional time. All students have a clear, productive task during all parts of the lesson.
MONITORING, REINFORCEMENT & REDIRECTION	Following a directive or expectation, teacher circulates and monitors compliance. Teacher positively narrates when students are meeting expectations. Students are respectfully and consistently held accountable for meeting classroom expectations through appropriate redirection (i.e. Whole Group Reminder, Anonymous Reminder, Proximity, Signaling, Quick Word, Public Correction, Inquiry). If warranted, students should be issued appropriate consequences (i.e. seat change, loss of privilege, demerits/choice chart, etc.).
APPROPRIATE LESSON	Teacher’s lesson is an applicable course lesson structure and reasonably aligned to the appropriate unit plan.
ACCURATE CONTENT	Teacher’s instruction, examples and answers to student questions are accurate and aligned to a conceptual approach.
CLASSROOM ENVIRONMENT	Classroom is clean and organized. Recent student work is displayed. Instructional displays are present, accurate, relevant, and neat.

Rigorous Instruction: In class, students are constantly engaged, challenged and carrying the vast majority of the cognitive load. Teacher is making purposeful moves to ensure students are learning and building a deeper, more nuanced, more conceptual understanding of the content. The teacher ensures each part of the lesson structure is rigorous and effectively capitalizes on student in-class experiences to increase conceptual understanding.

Strand	Description
STUDENT GROWTH	Evidence of appropriate student growth over time. Over the course of the observation window, individual students' work products are increasing in accuracy, sophistication and depth. Students demonstrate increasing independence in class (designing own note structures, using resources to work through problems, etc.) and out of class (preparing ahead of time for class activities, prioritizing studying and reviewing when needed, etc.).
HIGH LEVEL STUDENT RESPONSE	Students' answers become more accurate and detailed through teacher prompting and clear expectations. Students are using accurate and precise academic and content specific language in a variety of contexts.
THINK AND DO	Students are actively learning through hands on practice, in depth engagement with material and student centered learning for a bulk of the lesson. Students are grappling with and working through difficult material to make connections, build conceptual understanding and internalize content.
ACCOUNTABLE TALK	Students are often engaged in teacher and student facilitated discussion that is structured, productive, and academically focused. When in academic discussions, students frequently and productively respond to and build upon the responses of their peers.
PREPARATION	Teacher is clearly prepared – lesson plan includes an accurate and appropriately rigorous lesson exemplar. In planning, teacher anticipates student misconceptions. Teacher consistently uses precise and accurate academic and content-specific language. Teacher modeling is nuanced and precise. All materials selected are purposeful, appropriate, rigorous, and aligned to the intended learning outcome.
RIGOROUS LEARNING OUTCOME	The daily lesson is driving towards new learning of a concept or skill that is appropriate and rigorous for students both individually and as a group.
RIGOROUS AND FOCUSED QUESTIONING	Teacher asks specific, high level and open ended questions that are purposefully driving towards exemplar responses from students. Teacher questioning facilitates students' ability to make meaning and build understanding of important and relevant content, information and/or connections.
ACTIVELY FACILITATE LEARNING	During all parts of the lesson – student independent work, small group discussions, pair shares, etc. – teacher circulates and reviews or listens to student responses and ideas. Teacher uses this data to push student learning – to have students learn from a great example, add nuance or clarity to responses, rethink approaches or solutions, or examine misconceptions. In particular, teacher sees error as a learning opportunity that reinforces the intended outcome.
SOLIDIFY STUDENT LEARNING	At necessary points in the lesson, teacher uses questioning, error analysis, focused class discussion, student presentation, teacher explanation or other method to illuminate, clarify and finalize relevant, important and aligned content, information or connections.
ASSIGNMENT AND ASSESSMENT	When needed, teacher designs and implements appropriate, rigorous in-class and out of class tasks and assignments that push student thinking, provide meaningful practice, and/or offer application opportunities. Teacher designs and administers appropriate, efficient, informative, authentic and aligned formative assessments to gather relevant and frequent data about student understandings, misconceptions and skills.

Classroom Culture: Teacher creates a positive and productive classroom culture that values individuals, builds respectful relationships and ensures students are gaining non cognitive skills alongside academic knowledge. Teacher actively builds student self-esteem, self-efficacy and a growth mindset through explicit instruction, reinforcement and highlighting persistence. The teacher focuses on creating a strong, academically focused community of students that support each other and are invested in their collective success.

Strand	Description
CULTURE OF PERSISTENCE	Students grapple productively and persist through difficult work. Students express a desire to take on challenges and a belief in their ability to tackle anything. Students take ownership for their learning by asking questions, accessing resources, and working to uncover support, ideas, approaches and answers. Students are comfortable expressing misunderstanding or confusion and view mistakes as learning opportunities.
PRODUCTIVE INTERACTIONS	Student interactions with peers and adults are productive – interactions facilitate a learning environment. Interactions are positive – students are positive, supportive and respectful.
PURPOSE & RATIONALE	When sharing expectations, teacher often provides logical, efficient and community centered rationale (i.e. affective statements) for academic and behavior expectations and redirections.
URGENCY & GOAL ORIENTATION	Teacher sets individual student and class academic goals, communicates progress and conveys urgency. Teachers actively invest students and parents in these goals and explicitly re-invest students as needed.
ENGAGING APPROACH	Teacher takes into account student interest, culture, background and experiences when preparing and executing instruction. Teacher presents materials and activities with genuine enthusiasm about the content and the assignment. Teacher uses students’ lived experiences to make connections to the work and content but/and always maintains a high, rigorous bar. When applicable, teacher uses the lens of history, socio-political context and power to engage students in text and other relevant material.
BUILD MINDSET	Teacher proactively and purposefully teaches and reinforces student mindset around self-efficacy and growth mindset. Teacher consistently promotes and praises student struggle, persistence, confidence and independence. Teacher is pushing students to increase independence, explicitly increasing expectations of student ownership of their own learning. Wall displays recognize individual students and their successes (academic and otherwise) that are directly related to hard work and overcoming obstacles.
RAPPORT & PROACTIVE RELATIONSHIP BLDG	Teacher is comfortable and confident in his/her interactions with students – always modeling positive and respectful interactions. Teacher builds strong individual relationships with all students. Teacher engages with and learns about individual students, their culture, family, background and experiences. Teacher is positive - the ratio of positive to negative comments is at least 3:1.
CREATE SOCIAL BELONGING	Teacher creates and maintains an inclusive classroom community that values and respects all students through norm setting and clear expectations. Communication with individual students and with the whole class consistently creates a safe, welcoming community/classroom culture. Teacher explicitly recognizes and praises students for being kind, supportive and community oriented. Teacher addresses students and holds them accountable when community norms are broken.

Student Centered & Differentiated: The classroom is truly student centered. The teacher is incredibly responsive, ensuring every student has the academic and social emotional skill to succeed and lead. Teacher is adept at constantly gathering and using nuanced and purposeful data from informal and formal assessments to strategically adjust instruction and approach based on individual student needs. Teacher knows their students deeply and is able to build social emotional skills through individual interactions and approaches.

Strand	Description
EXCEPTIONAL STUDENT GROWTH	All students are making exceptional growth over time. Some students have an especially steep trajectory – surpassing expectations. Growth is concrete, measurable and often exceeding grade level, course, or IEP-driven expectations. Students are effectively completing projects and assignments that require significant out of class work, student driven peer collaboration, and independent pursuit as appropriate.
STUDENT LEADERSHIP & VOICE	Students have a high level of ownership over their classroom and learning. Student feedback and voice play an active role in teacher’s instructional practice, shaping teacher’s approach, support, and design and influencing teacher innovation. Students have authentic and meaningful responsibilities in the classroom that ensure classroom productivity and student ownership of learning (i.e. class jobs, discussion leaders, teaching/supporting peers, selecting content or texts, etc.).
STRATEGICALLY RESPONSIVE	Teacher constantly checks for nuanced student understanding of all concepts explored and presented. Teacher gathers and tracks student information from CFUs daily through effective questioning, observation, conferencing and student work review. Teacher uses qualitative and quantitative student data gathered during the lesson to drive questioning, student work selection, individual student support. Teacher adjustments to the lesson in real time are strategic and highly effective, consistently yielding a high impact on the trajectory of student learning.
STUDENT FEEDBACK, COACHING & SUPPORT	Teacher provides written and verbal feedback to students that is frequent, authentic, meaningful and drives a change in student action both during the lesson and throughout the report period. Teacher coaches individual students with feedback/support to improve their academic talk, group engagement, conflict resolution and other academic and social emotional skills. Teacher provides additional academic and/or behavioral student support and attention for consistently struggling students. (i.e. office hours, extra practice, peer support, etc.).
PLANNED DIFFERENTIATION	Teacher uses data from prior lessons and assessments during the course of the report period to proactively design differentiation strategies (i.e. small groups, scaffolded assignments, extension activities, etc.) to ensure the majority of students move towards content mastery and beyond. Supports and structures do not undermine the purpose of the lesson. Teacher takes into account behavior and social emotional needs of students and proactively plans accordingly.
RESPONSIVE COMMUNITY BUILDING	Teacher effectively uses restorative circles, morning meeting, and class conversations to address class wide issues such as low motivation, student conflict, community-wide events or other issues that are holding students back from fully engaging in the classroom.
PROFESSIONAL ENGAGEMENT & INNOVATION	Teacher actively pursues opportunities within and outside of the organization to improve his or her craft. Teacher works alongside school and central leaders to innovate – to develop or refine instructional approaches or moves that enhance student learning and independence. As appropriate, teacher actively and clearly shares this learning with peers and the larger Mastery community.

Teacher Observation & Classroom Evaluation Protocol

Frequently Asked Questions

How often will I be observed?

Every teacher will be observed at least four times during a single observation window. There are three observation windows during the year.

Who will observe me and give me evaluative feedback?

You will mostly be observed and evaluated by the administrator in your building that specializes in your content. You will also likely be observed and evaluated by other administrators and the principal. In some schools, teacher leaders will play a role in teacher observation and evaluation.

How will the observer engage in my classroom during the observation?

An observer's activities in the classroom will vary depending on circumstance. An observer will always gather information through various methods such as watching instruction, examining student work, looking at wall displays and teacher's lesson plans, and/or engaging directly with students through questioning. An observer may also provide real time feedback to the teacher during the observation or engage directly in the lesson in other ways (pose questions to students, model a strategy for the teacher, etc.)

What class/course/cohort will be observed?

Administrator may observe you in any class, course, or cohort that you instruct including core classes, Mastery class, electives, morning meeting, Second Step, etc.

Will I have advance notice of upcoming observations?

Observations are generally unannounced and can occur any time during the observation windows.

Will I get feedback from every observation?

You will receive written email feedback from every observation from an evaluator within 2 business days of an observer visiting your classroom. Written feedback will include data about student work, areas of strength, areas for growth and concrete most important next steps for the teacher.

Will I receive feedback on every standard from the Instructional Standards and/or every strand within a standard?

No. You will always receive feedback on the seven strands within the Instructional Foundations standard. If those are not met, the bulk of your feedback will focus solely on Instructional Foundations and not on other standards. If most to all of the Instructional Foundations standard is met, you will receive prioritized feedback from the remaining standards (Rigorous Instruction, Classroom Culture, and/or Student Centered & Differentiated). Because observations are typically 15-20 minutes, some of the strands in the standards may not be applicable or observed in that time and therefore do not warrant feedback. Additionally, the observation feedback is intended to support teachers in determining greatest strengths, greatest areas of growth, and the most important next steps. Therefore, only some of the Instructional Standards strands will be highlighted in feedback.

Do I get a score for every observation?

No, you will not receive a score for every observation. You will receive a score (unsatisfactory, developing, proficient, advanced, outstanding) at the end of each window. That window score will take into account all information from observations, student work review and the arc of teacher improvement that occurred during that window.

Why can't I get a score after each observation?

Evaluation scores on the Instructional Standards are designed to reflect an overall instructional skill and effectiveness of instructional execution. A single observation is too short and has too little information to determine a score. The score is intended to reflect performance over time in multiple settings, therefore it cannot be determined with a single 15-20 minute observation.

What performance information will I receive after every observation?

After every observation you will receive information about the degree to which you are on track to meeting expectations for your teacher performance category (Associate, Sr. Associate, Advanced, Master) given the information and data gathered thus far in the observation window.

How many scores will I receive in a year?

There are three observation windows in the year. You will receive a summary conversation and a score for each of those windows— 3 scores per year.

Will I get a Post Observation Debrief Meeting after every observation?

Possibly, or you may have none in an entire window. Post observation debriefs will occur more frequently than in the past, but they are not a universal approach. Administrators will determine if meeting after the observation would be beneficial in increasing a teacher’s ability to implement the most important next steps. If so, the administrator will schedule and hold a Post Observation Debrief Meeting. In some cases, a meeting may not be the best strategy and written feedback may suffice. In other situations, the teacher’s most important next step from the observation can best be supported through administrator modeling, modifying an upcoming planning meeting or some other coaching method.

Will I continue to receive feedback on the Instructional Foundations even if they are consistently evident in my classroom?

Yes, at least for the first semester and likely beyond. Because those student outcomes and teachers skills must be present at all times for classroom success, observers should always confirm that they are present and make note if they are not. If some or many of the Instructional Foundations are not being met, the majority of your feedback will focus on improving those teacher actions and student outcomes.

Can I ask for additional observations over the course of the window?

You should always reach out for additional support and/or observations if you believe they would be helpful in improving your practice. Administrators are committed to supporting your development and will work to provide any possible additional support that their capacity can allow. In some cases, an administrator may determine that other supports would be more helpful for your development (observing peers, support from a NST coach, co-planning, etc.) and may suggest those activities for you as well.

Where can I get more information about teacher evaluation at Mastery beyond classroom observations (i.e. mid year and end of year evaluations, salary and promotion expectations, explanation of MVAS, clarity around goals for my position, etc.)?

Reach out to your principal or Human Resources for further clarity on other aspects of the Mastery Teacher Advancement System.

MASTERY VALUES

Updated March 2013

The nine Mastery values drive Mastery’s mission and have a consistent and significant impact on our School’s performance through demonstrated leadership. Our values, defined below, create a common language around how our staff should conduct themselves at Mastery. For each Value listed below, there is a description of the value and expectations for the specific performance categories for someone who is new to the position (Senior Level), someone who is progressing (Advanced Level), and someone who is a veteran (Mastery Level).

Value	Description	Performance Category Expectations		
		SENIOR LEVEL	ADVANCED LEVEL	MASTER LEVEL
Student Achievement	Student achievement is the civil rights issue of our time and the reason we exist. Each staff member is responsible for our students’ success.	<ul style="list-style-type: none"> Capable of being a contributor to student success by producing useful, quality work, and admirable projects with student success in mind Understands that student achievement is critical to the organization’s success 	<ul style="list-style-type: none"> Proven abilities in contributing to student success by producing quality work and developing projects with a focus on results Embodies student achievement and applies it into daily job tasks, responsibilities and projects Supports peers with applying the idea of student achievement into their outputs 	<ul style="list-style-type: none"> Exemplifies abilities to drive daily work with student achievement in mind Manages and leads projects by demonstrating initiative with positive results in mind Leads peers to produce high quality work and projects that align with student achievement Puts student achievement above all else
We Serve	We serve students and their families first. Our business is their success.	<ul style="list-style-type: none"> Understands that it is essential to serve families and students above all else Is led by others to serve students and their families in schools and the community 	<ul style="list-style-type: none"> Recognizes that it is critical and leads team to serve families and students above all else Organizes and leads programming in our schools and the community Contributes to improving our schools, programming, and culture 	<ul style="list-style-type: none"> Drives initiatives to lead team to serve families and students above all else Develops projects and plans in advance for future programming for schools and the community Leads others and contributes to improving our schools, programming, and culture
The High Road	We do the right thing. We are fair and treat folks with respect.	<ul style="list-style-type: none"> Understands and demonstrates doing the right things while treating others with respect Effectively communicates with peers Seeks appropriate avenues when conflicts arise 	<ul style="list-style-type: none"> Demonstrates doing the right thing and regularly treats others with respect Effectively communicates with peers and encourages them to conduct themselves appropriately Manages conflicts appropriately and sets a positive example to others 	<ul style="list-style-type: none"> Exceptional in always doing the right thing and consistently treats folks with respect Drives effective communication and is transparent with demonstrating to team how to conduct themselves appropriately Projects when conflict may arise and resolves it in advance

				to set positive examples to others
Grit	Our students' futures are at stake – we don't give up. We do more with less. If it doesn't work, we fix it. We find a way.	<ul style="list-style-type: none"> • Understands that our students' futures are at stake and does not give up on tasks, work, and projects • Seeks appropriate channels to do to more with less • Supports others with finding ways to make failures successes 	<ul style="list-style-type: none"> • Consistently demonstrates the understanding that students' futures are at stake and conquers challenges with tasks, work, and projects • Executes actions for doing more with less • Leads and supports others with finding ways to make failures successes 	<ul style="list-style-type: none"> • Always demonstrates the understanding that students futures are at stake and conquers challenges, work, and projects while leading others • Drives actions for doing more with less • Strategically acts while leading and supporting others with finding ways to make failures successes • Forecasts solutions for the future
Joy & Humor	Our positive, caring culture supports student and staff success. We like fun. We love to laugh.	<ul style="list-style-type: none"> • Consistently demonstrates a positive and caring approach to our culture of students and staff • Participates in fun and laughter while always respecting others • Participates in fun events with peers 	<ul style="list-style-type: none"> • Exemplifies a positive and caring approach to our culture of students and staff • Often participates in fun and laughter while always respecting others • Is an example to students and staff in showing that fun and respect align • Organizes fun events with peers 	<ul style="list-style-type: none"> • Drives a positive and caring approach to our culture of students and staff • Always participates in fun and laughter while consistently respecting others • Is a role model who leads students and staff in showing that fun and respect align • Drives and organizes fun events with peers
Straight Talk	We face reality, communicate honestly and respectfully, and hold each other accountable.	<ul style="list-style-type: none"> • Understands honest communication and respect • Holds self and others accountable for responsibilities, deadlines, tasks, outputs, and projects • Is receptive to both positive and constructive feedback 	<ul style="list-style-type: none"> • Exemplifies honest communication and respect while encouraging peers to follow • Consistently holds self and others accountable for responsibilities, deadlines, tasks, outputs, and projects • Consistently receptive to feedback both positive and constructive; provides positive and constructive feedback to 	<ul style="list-style-type: none"> • Drives honest communication and respect while leading team to follow • Always holds self and others accountable for responsibilities, deadlines, tasks, outputs, and projects • Always receptive to feedback both positive and constructive; provides positive and constructive feedback to others • Demonstrates as a leader how

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			others	to provide honest and respectful communication to others
Open Doors	Everybody is welcome to talk to anybody. We are open and transparent.	<ul style="list-style-type: none"> • Understands that talking to anybody; students and staff is important • Applies morals and ethics by knowing to tell someone when involved in a challenging situation 	<ul style="list-style-type: none"> • Consistently demonstrates the understanding that talking to anybody is important; students and staff • Consistently applies morals and ethics by knowing to tell someone when involved in a challenging situation • Consistently encourages peers to collaborate outside their work team 	<ul style="list-style-type: none"> • Always demonstrates the understanding that talking to anybody is important; students and staff • Always applies morals and ethics by knowing to tell someone when involved in a challenging situation • Is able to handle challenging situations before seeking outside support • Always leads peers to collaborate outside their work unit
Continuous Improvement	We seek a better way – always. We are engaged in an ongoing cycle of goal setting, action, measurement, and analysis.	<ul style="list-style-type: none"> • Understands the value of self-improvement personally and professionally • Sets and works toward actions and goals • Strives to improve outputs and professional development 	<ul style="list-style-type: none"> • Exemplifies self-improvement personally and professionally • Achieves actions and goals while planning for the future • Takes initiative toward professional development • Works to fine-tune outputs • Supports peers with personal and professional development 	<ul style="list-style-type: none"> • Drives self-improvement personally and professionally, as well as process for team members • Drives execution and successful accomplishment of goals while planning for the future • Takes initiative toward professional development and encourages team to do so • Works to fine-tune outputs
One Team	We are in this together. We may disagree, but at the end of the day, we support each other 100%.	<ul style="list-style-type: none"> • Understands how to support peers and the organization through collaborative work • Works collaboratively on projects with peers inside and outside department • Appreciates peers' strengths and skills 	<ul style="list-style-type: none"> • Exemplifies how to support peers and the organization through collaborative work • Demonstrates commitment to a common purpose and performance goals • Leads collaborative efforts on projects with peers inside and outside department • Appreciates and supports improvement to peers' strengths and skills 	<ul style="list-style-type: none"> • Drives support to peers and the organization through collaborative work • Demonstrates commitment to a common purpose and performance goals • Leads collaborative efforts on projects with peers inside and outside department • Drives improvement of peers' strengths and skills

STUDENT SURVEY SAMPLE

I am excited to come to class...

- All the time Most of the time Sometimes Not usually Never

My teacher cares about me...

- All the time Most of the time Sometimes Not usually Never

My teacher explains things clearly...

- All the time Most of the time Sometimes Not usually Never

My teacher notices my good work...

- All the time Most of the time Sometimes Not usually Never

My teacher works with me until I understand...

- All the time Most of the time Sometimes Not usually Never

Do you have any other advice for your teacher?

MASTERY CHARTER SCHOOLS MANAGEMENT MODEL

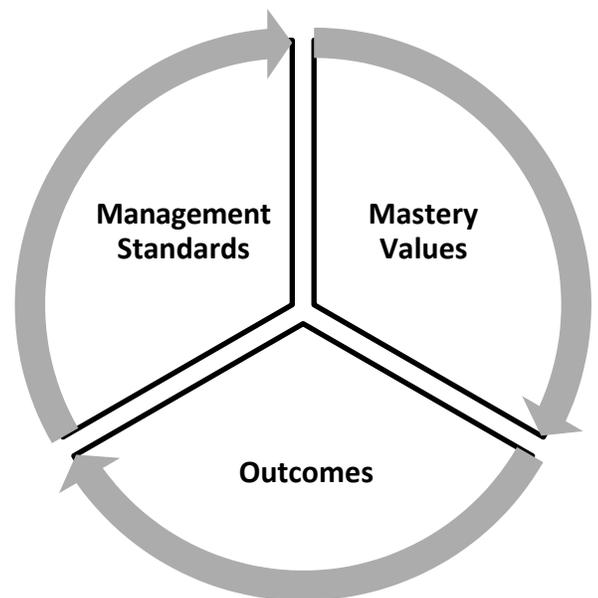
OVERVIEW

Mastery Charter Schools employs a performance based leadership advancement and compensation system called the Mastery Management Model (M3). By basing advancement on performance rather than seniority, Mastery Charter Schools intends to attract, support, and retain the highest quality administrators. The system has three performance categories, each with a specific advancement criteria and salary range (for each position). The performance categories are: **Senior, Advanced, and Master**. M3 aligns with the teacher advancement system in that there are performance categories and administrators are evaluated on three components: Management Standards, Mastery Values, and Outcomes. Consistent with Mastery Values, the system strives to make the advancement standards, processes, and salaries fair and transparent.

ADVANCEMENT CRITERIA

The Mastery Management Model (M3) complements the Teacher Advancement System and shapes the way we support, train, and evaluate our non-instructional staff. The model, similar to the teacher advancement system, incorporates three main areas in which performance will be evaluated:

1. **Management Standards** – the set of skills and competencies Mastery Charter Schools leaders need to be effective. These Standards will provide a common language and guide professional development. Please see Appendix I for a complete list of the Management Standards.
2. **Mastery Values** – values provide a common language around how staff should conduct themselves at Mastery Charter Schools. We expect our non-instructional staff to have a consistent, significant impact on the school’s performance through demonstrated leadership.
3. **Outcomes** – role-specific, expected results which are tied to an individual’s job responsibilities. Outcomes should be developed at the start of each school year with the principal and the individual’s manager.



REVIEWS

Mid-Year Feedback

The midyear conversation serves as a structured time for Managers to provide feedback and for employees to learn more about performance. The purpose of the conversation is developmental. Managers will highlight areas where an employee is doing well and where they need further development. These conversations are meant to reflect upon performance in the various Management Model areas: Standards, Values, and Outcomes.

End-of-Year Evaluation

The purpose of the end-of-year (EOY) evaluation is to provide feedback to employees related to their performance throughout the year. During the EOY evaluation, managers will discuss all three areas of the Management Model, provide strengths and development areas, and review outcomes and goals. Employees will receive their performance category and salary for the following year during this evaluation. Employees starting after January 1st will not be eligible for a merit increase.

PERFORMANCE CATEGORIES AND EXPECTATIONS

Similar to the Teacher Advancement System, there are performance categories for non-instructional staff. These performance categories are: **Senior, Advanced, and Master**.

Individuals will need to meet the performance expectations for their particular level – and exceed those expectations to be promoted to the next level. Below is a guideline for performance expectations for each level across the three M3 areas. The salary scales for this year for each position and category are located in Appendix 2.

	Standards	Values	Outcomes
Senior	A capable leader who demonstrates potential toward executing the Management Standards. Individual is able to operate independently and shows proficiency in several standards, but is inconsistent in delivering on other standards.	Consistently acts in accordance with Mastery Values and contributes to the school community.	Positive evidence of progress toward meeting performance outcomes. Moderate contribution to overall school-wide goals.
Advanced	A proven leader who consistently delivers on the expectations of the Management Standards. Individual shows strengths in many standards, actively and specifically addresses development areas, and demonstrates strong overall self-management.	Exemplifies Mastery Values and contributes to the Mastery and school community. Individual goes above and beyond in demonstrating commitment to Mastery Values.	Meets designated performance outcomes. Contributes to overall school-wide goals.

Master	An exceptional leader who demonstrates excellence in executing the Management Standards. Individual exhibits strengths in all standards, is always consistent when delivering on standards, and positively develops others in mastering the standards.	Drives Mastery's Values and serves as a role model for others within Mastery. Has a significant positive impact on the Mastery and school community.	Exceeds designated performance outcomes. Strongly impacts overall school-wide goals.
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DECISION MAKING

M3 criteria will be the primary evaluation tool: Management Standards, Values, and Outcomes.

1. Performance Category Promotion - Meets the criteria for promotion in all areas:
 - a. Ability to demonstrate all Management Standards at the higher performance category.
 - b. Always meets the described performance level for Mastery values at the promoted category level.
 - c. Meets outcomes described by promoted category level.
 - d. Admin staff promoted to a new category will be placed at the beginning of the category salary scale.
2. Salary Raise - Meets the criteria for current level and exceeds criteria in some areas:
 - a. Ability to demonstrate Management Standards is mixed, with some areas at the next higher category level and others at the existing category level.
 - b. Meets, and often exceeds, the described performance level for Mastery values at the current category level.
 - c. Meets outcomes criteria described by promoted category level.
 - d. Employees who meet all criteria for the category will be placed in the middle of the salary range. Admin staff who exceed in most areas but have not met the criteria for promotion to the next level will be placed at the higher end of the salary range.
3. Minimum Salary Increase
 - a. Ability to demonstrate Management Standards is at the current category level and some areas may be below current category.
 - b. Meets the described performance level for Mastery values at the current category level.
 - c. Makes limited progress toward outcomes.
 - d. Employees who are struggling to meet all criteria for the category will not receive an increase (0%).

**Employees who begin employment after January 1 of the school year will not be eligible for a salary review.

APPEAL/REVIEW PROCESS

A leader who feels his/her salary placement has not been determined consistently with the above guidelines, should first discuss these concerns with his/her School Leader within three days of the End of Year Conversation. If the matter is not resolved with the School Leader, the leader should contact Human Resources and request that Human Resources review the salary determination. Human Resources will require that the leader state in writing the reason they believe the salary placement guidelines have not been followed appropriately. Leader must submit written concerns within three

days of notice to Human Resources. Human Resources will review the evaluation data and discuss the matter with the School Leader. Human Resources will make a recommendation and review the recommendation with the CFO. The final decision will be presented to the leader within five business days of receiving written request.

State	School Type	Metric	Metric Description	State Data	2015 Perf
PA & NJ	elem, K-8	Early Reading (K-2nd)	Percent of enrolled K-2 graders that have scored at Independent level D, I, M respectively on the F&P assessment by the last administration window		47.3%
PA Only	Elem, K-8, Middle, Middle/High	Elem Reading P/A (3rd-8th)	Percent of 3-8 graders who count towards SPP that have scored P/A on the Reading PSSA . New students who enroll after Oct 1 don't count towards SPP.	40% (approx 2015 PA average)	27.7%
NJ Only	Elem, K-8, Middle, Middle/High	Elem ELA Score 4-5 (3rd-8th)	Percent of 3-8 graders who score 4 or 5 on PARCC ELA. All students enrolled at the school during testing count.	50% (approx 2015 NJ average)	---
PA Only	Elem, K-8, Middle, Middle/High	Elem ELA B/P/A (3rd-8th)	Percent of 3-8 graders who count towards SPP that have scored B/P/A on the ELA PSSA . New students who enroll after Oct 1 don't count towards SPP.	89% (approx 2015 PA average)	66.0%
NJ Only	Elem, K-8, Middle, Middle/High	Elem ELA Score 2-5 (3rd-8th)	Percent of 3-8 graders who score 2-5 on PARCC ELA. All students enrolled at the school during testing count.	90% (approx 2015 NJ average)	---
PA Only	Elem, K-8, Middle, Middle/High	Elem Math P/A (3rd-8th)	Percent of 3-8 graders who count towards SPP that have scored P/A on the Math PSSA . New students who enroll after Oct 1 don't count towards SPP.	60% (approx 2015 PA average)	11.2%
NJ Only	Elem, K-8, Middle, Middle/High	Elem Math Score 4-5 (3rd-8th)	Percent of 3-8 graders who score 4 or 5 on PARCC Math. All students enrolled at the school during testing count.	38% (approx 2015 NJ average)	---
PA Only	Elem, K-8, Middle, Middle/High	Elem Math B/P/A (3rd-8th)	Percent of 3-8 graders who count towards SPP that have scored B/P/A on the Math PSSA . New students who enroll after Oct 1 don't count towards SPP.	80% (approx 2015 PA average)	34.1%
NJ Only	Elem, K-8, Middle, Middle/High	Elem Math Score 2-5 (3rd-8th)	Percent of 3-8 graders who score 2-5 on PARCC Math. All students enrolled at the school during testing count.	90% (approx 2015 NJ average)	---
PA Only	Elem, K-8, Middle, Middle/High	Elem Science P/A (4th, 8th)	Percent of 4th and 8th graders who count towards SPP that have scored P/A on the Science PSSA . New students who enroll after Oct 1 don't count towards SPP.	4th- 59% (approx 2015 PA average) 8th- 77% (approx 2015 PA average)	35.9%
NJ Only	Elem, K-8, Middle, Middle/High	Elem Science P/A (4th, 8th)	Percent of 4th and 8th graders who score Proficient or Advanced Proficient on NJASK Science 4/8. All students enrolled at the school during testing count.	91% (approx 2015 NJ average) 77% (approx 2015 NJ average)	---
PA Only	Middle/High, High	Keystone Algebra- 1st Time Pass Rate	Percentage of Algebra 1 and Algebra 1b enrolled students that pass the Algebra Keystone duringthe Spring proctoring.	50% (approx 2014 and 2015 PA FTTT average)	---
NJ Only	Middle/High, High	PARCC Algebra I	Percent of Algebra I students who score 4 or 5 on PARCC Algebra I. All students enrolled at the school during testing count.	36% (approx 2015 NJ average)	---

State	School Type	Metric	Metric Description	State Data	2015 Perf
PA Only	Middle/High, High	Keystone Biology- 1st Time Pass Rate	Percentage of Biology enrolled students that pass the Biology Keystone during the Spring proctoring.	55% (approx 2014 and 2015 PA FTTT average)	---
NJ Only	Middle High, High	NJBCT Bio	Percent of Biology students who score Proficient or Advanced Proficient on NJBCT. All students enrolled at the school during testing count.	58% (approx 2015 NJ average)	---
PA Only	Middle/High, High	Keystone Lit- 1st Time Pass Rate	Percentage of 10th grade Literature enrolled students that pass the Literature Keystone during the Spring proctoring.	65% (approx 2014 and 2015 PA FTTT average)	---
NJ Only	Middle High, High	PARCC ELA 9-11	Percent of 9-11 graders who score 4 or 5 on PARCC High School ELA All students enrolled at the school during testing count.	39% (approx 2015 NJ average)	---
PA & NJ	Middle/High, High	Advanced Coursework Success	Percent of enrolled 12th graders that possess a college credit or AP score of 3 or greater by June. This includes students who earned the credit during the active year as well as currently enrolled students that have earned the credit in the past.		---
PA & NJ	Middle/High, High	ACT College-Ready 21 (11th)	Percent of 11th grade students that score ≥ 21 on the ACT Composite (including Writing) on the Spring proctored ACT		---
PA & NJ	Middle/High, High	ACT HS Equivalent 15 (11th)	Percent of 11th grade students that score ≥ 15 on the ACT Composite (including Writing) on the Spring proctored ACT		---
PA & NJ	Middle/High, High	Pilot: ACT Aspire- College Ready 21 (9)	Percent of 9th and 10th grade students that score ≥ 21 on the Aspire Composite bottom of range (including Writing)		---
PA & NJ	Middle/High, High	Pilot: ACT Aspire- HS Equivalent 15 (9)	Percent of 9th and 10th grade students that score ≥ 15 on the Aspire Composite bottom of range (including Writing)		---
PA Only	Middle/High, High	Transition: Algebra Keystone 9-11	Percent of enrolled 9-11th graders that have scored proficient or advanced on the Algebra Keystone during the school year or in the past.		---
PA Only	Middle/High, High	Transition: Lit Keystone 10-11	Percent of enrolled 10-11th graders that have scored proficient or advanced on the Lit Keystone during the school year or in the past.		---
PA Only	Middle/High, High	Transition: Bio Keystone 9-11	Percent of enrolled 9-11th graders that have scored proficient or advanced on the Bio Keystone during the school year or in the past.		---

MANAGEMENT STANDARDS

Updated March 2013

Mastery believes that strong leaders need to demonstrate a set of skills or competencies in order to be effective. These skills, known as Management Standards provide a common language around performance and professional development for Mastery Administrators. For each Standard listed below, there is a definition of the standard; a set of characteristics related to the standard, expectations for the specific performance categories for someone who is new to the position (Senior Level), someone who is progressing (Advanced Level), and someone who is a veteran (Master Level).

Management Standard	Definition	Key Characteristics	Performance Category Expectations		
			SENIOR LEVEL	ADVANCED LEVEL	MASTER LEVEL
Execution	<p>Mastery is a results-oriented organization with a focus on getting the job done efficiently and accurately.</p> <p>We hold ourselves to high expectations and take accountability for meeting goals. We plan for challenges, but also react quickly to the unexpected. We remain focused and determined so our students achieve at the highest levels.</p>	<ul style="list-style-type: none"> • Ability to work efficiently and thoroughly on multiple projects • Quality of work product defined by accuracy, competency, and thoroughness • Forecasting for upcoming work and challenges • Ability to handle stress effectively • High expectations for work • Accountability for meeting goals • Ability to engage and motivate staff to attain goals • Dynamic execution plans that are driven by tangible actions • Attitude of enthusiastic expectancy in others regarding change and challenge • Recognizes viable creative ideas of others and brings them to the 	<ul style="list-style-type: none"> • Capable of multi-tasking and managing multiple projects • Work is good quality and generally well executed • Demonstrates ability to forecast and plan for upcoming work and challenges • Able to remain productive and calm in stressful situations • Always demonstrates high expectations for own work • Holds self accountable to meeting goals; effectively able to changing work direction to attain goals • Capable of motivating staff to attain goals • Demonstrates creativity in daily work and appreciates the creativity of others 	<ul style="list-style-type: none"> • Proven abilities in multitasking and managing multiple projects to always meet deadlines • Excelling toward admirable work and takes initiative in foreseeing future projects • Executes the forecasting and planning for anticipated work and future projects • Rises to the occasion in stressful situations • Fine-tunes own work and is an example to others to produce quality work • Regularly holds self accountable to meeting goals; shares ideas with peers to improve direction of work to attain goals 	<ul style="list-style-type: none"> • Exceptional in completing multiple, complex projects on time and accurately • Executes exceptionally high-quality work with precision • Always strategically and effectively plans for upcoming work and challenges; is able to see the whole picture in planning • Consistently able to be productive and calm in stressful situations • Always demonstrates high expectations for own work • Holds self and others accountable in meeting demanding goals; outstanding ability to change course with work to attain goals • Successfully motivates and pushes staff to achieve the highest results • Empowers others to

		<ul style="list-style-type: none"> • table • Anticipates impact of change, and directs self and others in smoothly shifting gears • Embraces change when change is necessary (act big) 	<ul style="list-style-type: none"> • Embraces change and the impact of change (act big) 	<ul style="list-style-type: none"> • Persuades other staff members to attain goals • Often exhibits creativity in daily work while valuing other's work • Supports with driving change, provides input to stakeholders, and drives peers to embody change 	<p>demonstrate creativity in daily work, appreciate the creativity of others, and encourage a creative space for thought and work</p> <ul style="list-style-type: none"> • Strives for change, embraces the impact of change, and empowers others to work through change (act big)
Problem Solving	<p>We meet challenges head-on. Problems get resolved through hard work, perseverance, and creative thinking. We take initiative to break down the complicated problems and devise strategic solutions that push our work forward.</p>	<ul style="list-style-type: none"> • Skill in breaking down and understanding complex issues • Ability to take initiative to strategically build a case to drive decisions • Ability to identify problem areas and generate creative and effective solutions 	<ul style="list-style-type: none"> • Capable of breaking down and understanding complex issues • Competent in ability to build a logical case to drive decision making • Is able to identify problem areas and generate a few reasonable solutions 	<ul style="list-style-type: none"> • Executes the breaking down and understanding of complex issues • Utilizes and acts on the ability to build a logical case to drive strategic decisions • Recognizes problem areas and supports stakeholders with generating effective solutions to solve 	<ul style="list-style-type: none"> • Exceptional ability to break down and understand complex issues • Always builds a logical case to drive strategic decisions • Constantly identifies problem areas; generates multiple creative and highly effective solutions
Job-Specific Knowledge	<p>We are smart, capable, driven people. If we don't already know it, we learn. We are dedicated to continuously building our knowledge and skills so we can better serve our students.</p>	<ul style="list-style-type: none"> • Level of knowledge in particular role • Strives to continue to build knowledge in field 	<ul style="list-style-type: none"> • Has adequate knowledge of what role entails • Demonstrates willingness and eagerness to grow and learn in role 	<ul style="list-style-type: none"> • Understands what the role entails and excels to meet goals and objectives • Acts on willingness to grow and learn by improving the role and performance 	<ul style="list-style-type: none"> • Highly experienced in position; exceptional knowledge in field and able to effectively coach others • Always takes advantage of opportunities to grow and gain more knowledge
Organization	<p>Our dedication to our cause is clear and we follow through on promises and commitments to each other. We know what has to be done and prioritize accordingly. Our systems and process are well-</p>	<ul style="list-style-type: none"> • Ability to prioritize work effectively • Commitment follow through • Has clearly defined organization system 	<ul style="list-style-type: none"> • Prioritizes work effectively to ensure workload is manageable • Follows through on commitments and is competent in time management 	<ul style="list-style-type: none"> • Prioritizes work effectively without direction using initiative • Balances workload to deliver acceptable complete work 	<ul style="list-style-type: none"> • Able to consistently and strategically break down and prioritize work to ensure quick and accurate completion • Always follows through on commitments and promises and does not

	defined, structured, and effective.		<ul style="list-style-type: none"> Building an effective organization system 	<ul style="list-style-type: none"> Executes own course of action to complete tasks and commitments on time or in advance Utilizes an effective organization system for seamless accomplishment of tasks, projects, and meetings 	<p>have time management issues</p> <ul style="list-style-type: none"> Organization system is highly effective and robust and always ensures tasks, projects, and meetings are prioritized well
Interpersonal Communication	Communication is the key to a respectful, productive organization. We value our professional relationships and don't shy away from the challenging conversations. We communicate with each other constructively and positively.	<ul style="list-style-type: none"> Communicates in a constructive, respectful, and positive manner Ability to have difficult and challenging conversations Proactively communicates w/parents and/or staff to ensure on same page 	<ul style="list-style-type: none"> Communication is always positive, respectful and constructive Capable of conducting difficult and challenging conversations Adept at proactively communicating with appropriate parties 	<ul style="list-style-type: none"> Communication is always positive, respectful, constructive, and sets example to peers Conducts difficult and challenging conversations Manages communications with appropriate parties to ensure all parties have a clear understanding of goals, objectives, and outcomes 	<ul style="list-style-type: none"> Communication is always positive, respectful and constructive Exceptional in conducting difficult and challenging conversations Always proactive in communicating with parents and staff; always ensures everyone is on the same page
Organizational Communication	Mastery is a community built from families, students, teachers, and leaders. We ensure that messages are consistent, community members are well informed, and our teams are cohesively developed. We establish an inclusive culture that promotes accountability and goal-oriented actions.	<ul style="list-style-type: none"> Develops systems that promote clear, open lines of communication Establishes a working culture that maintains organizational images, missions, and values Creates routines and rituals that promote a positive school culture Delivers consistent, timely messages that are inclusive of all community members 	<ul style="list-style-type: none"> Systems are clear and an effective means for communication Creates and models a working culture by establishing clarity, context, and accountability Routines and rituals encourage a positive school culture Proactively delivers messages that are consistent, timely, and inclusive 	<ul style="list-style-type: none"> Systems are fine-tuned for clarity and effectiveness for communication Executes and focuses on improving models for a working culture by demonstrating clarity, context, and accountability Improves routines and rituals to boost a positive school 	<ul style="list-style-type: none"> Systems drive a positive organizational by establishing clarity, context, and accountability Routines and rituals support and uphold the positive school culture and establish an inclusive atmosphere Proactively delivers messages that are consistent and timely and promote clear, open lines of communication

				<p>culture</p> <ul style="list-style-type: none"> • Develops and delivers messages that are consistent, timely, and inclusive 	
<p>Managing Others (where applicable)</p>	<p>People are our greatest resource and we take great measures to ensure each person’s success. We set proper expectations for those we manage and are actively engaged in their work. Effective prioritization and delegation creates a culture of success in our schools. We support professional growth and development through constant coaching, positive reinforcement, and constructive feedback.</p>	<ul style="list-style-type: none"> • Sets appropriate expectations for staff performance and establishes goals that are SMART • Adheres to the ‘Write-it-Down’ philosophy, and follows-up on staff progress with regular meetings • Delivers clear directions and appropriately distributes work to staff • Provides ongoing constructive feedback and coaching that aligns to Mastery’s IS and M3 	<ul style="list-style-type: none"> • Expectations and goals for staff are appropriate and SMART • Actively engages in the “write-it-down” philosophy and constantly tracks progress of staff with regular meetings • Directions are clear and consistent, and work distribution is appropriately delegated to team members • Feedback is effective and constructive, and aligns to Mastery Standards (M3 and IS) 	<ul style="list-style-type: none"> • Expectations and goals for staff are appropriate, clear, and SMART; staff are receptive to development • Manages the “write-it-down” philosophy, tracks progress of staff, and develops strategies for improvements • Directions are clear and consistent; work ownership is taken on by employees having clear expectations of goals and objectives • Feedback is effective and constructive; aligns to Mastery standards; staff understand expectations and embark toward success 	<ul style="list-style-type: none"> • Expectations for staff are always set, and followed-up on regularly; goals are always SMART and staff is fully invested in and accountable for attaining goals. • Proactively engages in and holds staff accountable to the “write-it-down” philosophy; consistent check-ins reinforce the philosophy and ensures staff progress • Directions are clear and consistent; proactively plans for and distributes work in a timely and appropriate manner to team members • Feedback is constructive and consistent; immediate and measurable progress can be seen from staff; alignment with M3 and IS is clear to all parties
<p>Mindset</p>	<p>Mastery creates a climate in which people can do their best. We assess personal strengths and use them to get the best out of each person. Our values and standards enable a culture where everyone can lead</p>	<ul style="list-style-type: none"> • Maintains poise and calm even in difficult decisions or in the midst of painful change • Ability to hold conflicting ideas and competing goals in balance 	<ul style="list-style-type: none"> • Consistently acts with humility, integrative thinking, and courage in all situations • Values opinions of all colleagues, even when differing • Open to feedback and 	<ul style="list-style-type: none"> • Habitually acts with humility, integrative thinking, and courage; sets a positive example for peers • Applies opinions of colleagues into 	<ul style="list-style-type: none"> • Always acts with humility, integrative thinking, and courage • Creates the space for all to act with humility, integrative thinking, and courage • Always responds with

	<p>with humility, integrative thinking, and courage. When confronted with challenges, we demonstrate the personal humility and professional will to achieve break-through results. We recognize the need to be self-aware and work on being better leaders.</p>	<ul style="list-style-type: none"> • Actively addresses resource and personnel situations head-on • Manage corrective feedback in a manner that inspires accountability and self-redirection among colleagues and direct reports • Embraces seemingly opposing and contradictory goals and values • Uses ingenuity in dealing with ambiguous situations and guides others to cope effectively 	<p>strives to better self</p> <ul style="list-style-type: none"> • Models the way when managing ambiguity 	<p>thought process and constructively responds; is considerate of peers' opinions</p> <ul style="list-style-type: none"> • Applies feedback to self-development and strives for improvement • Manages situations of ambiguity and leads peers towards positive course of action 	<p>empathy to all opinions, seeking to understand first</p> <ul style="list-style-type: none"> • Delivers constructive feedback in a manner that inspires accountability and self-redirection among colleagues and direct reports • Proactively embraces ambiguity and empowers others to work through the gray area(s)
<p>Instruction (Internship Coordinators; College Advisors)</p>	<p>N/A</p>	<ul style="list-style-type: none"> • Ability to meet Mastery's Instructional Standards 	<ul style="list-style-type: none"> • Demonstrates a 3 ('Proficient') rating or above in observations • Is accomplished in executing Mastery's Instructional Model 	<ul style="list-style-type: none"> • Demonstrates a 4 ('Advanced') rating or above in observations • Is excelling in the execution of Mastery's Instructional Model 	<ul style="list-style-type: none"> • Demonstrates a 5 ('Outstanding') rating in observations • Is outstanding in executing Mastery's Instructional Model

PD Type	Days	Location	Type	Description
1/2 day central content	Full PD Days (either mid RP or first of 2 End of RP days)	Central and Site	Central and Site	Most teachers will engage in PD at a central site from 8am-12pm. Be released at least 1 week in advance.
1/2 day PD, h & cont	Wednesdays	Collins	34S	o>dl&c l)d'M'lh\&ch• f PD II bezi, ll' lito6...c!J\'.s t lRo>Jlo} Durintt.k!l' p ol t'h% ff'y ,f' ll<l lji fil,Sj>tl.m.,5E,Wllingllilit l)l'nd 'Sci tmhetiW(jll .. v.ho nl•••lm l6,coot.mt% edleoll,bo,..llo ll'dr O
Cultural It>IS hma k i	Wednesdays	Site	34S	Cultural C011tt-xt TriTnlnt,ie +Htt111yda)fgn'dsessron,rt.fthV1to ba,spil It icfr,ror adnlmsul for facill Dfs...seutons wJU bo dowt(adedto fticillitors1 weekf iad vInf oo,lJc-onUM thh timo for bonchma.kgradmaor Ho n POfTne.
OPEii PIC	Wednesdays and some full PD days	Site	34S	ou ntttforihe POh,cmIn:d-Slls,ue able to u this! Hla,h they fit! I or•led bysltcb•.d f• cfnoto<>•Hhe-, H.
bp\(<lo I f.,.,.,Q' Mno,jeil:lll.st<SJon	Wednesdays and some full PD days	Site	34S	NT:63J W(lIJ; optll>fi•!• \1cut - (i46 D L }6f tifvon\ht;i C -tt d ,:fp ••.ll;:rt s. ..lwf• lcl'rra v•nwondlehooc< lhl>0, , \? up IW bet< ta oltonil,s...lonSI lj moll-'! pllcsl'jela n<w/ondMro.iM'elln& m<Mr,...

NEW LEADER PD SERIES

Designed to supplement ASLs field experiences, the New Leader J>D series includes 6 sessions of in- depth, actionab le training focusing on both technical competencies and l argE(i leadership mindset s. Sessi on outcomes are aligned wi th and support successful fi eld exper ience.

MASTERY LEADERSHIP MINDSETS				
Humility & Will				
Take 100% Responsibility	Acknowledge the Game	Focus on Doing	Manage Performance	Value Critique
MASTERY LEADERSHIP SKILLS				
Organization	Execution	Management	Professional Development	

Session	Title	Detail
1	Personal Organization - Franklin Covey	Master the art of prioritizing competing responsibilities, tasks, and commitments and using organizational tools to ensure your time is always spent on the most important things.
2	Active Management Dive	Successful management is more than just moving the needle- it is constantly and significantly improving overall performance at the highest rate and quickest pace possible. This session focuses on how the most effective managers set the pace for growth and actively manage their staff to match it.
3	Difficult Conversations- Reflection & Practice	Effective leadership and management requires taking on challenging conversations. This session will build off of previous work on this skill and focus on reflection and additional practice.
4	Role-Specific/ Responsive	Work alongside a network leader and your role-specific colleagues
5	Effective PD Design & Facilitation	Dive deep into key facilitative tactics like strong framing, questioning, and challenging participants for group professional development.
6	MY Evaluations	Become fluent in both Mastery's performance evaluation systems and processes, and focus on how to maximize these as a manager -with a particular focus on managing staff who are underperforming.

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MASTERY CHARTER SCHOOLS SUMMER TRAINING CALENDAR FOR ADMINISTRATORS-SUMMER 2016

dBte	day	external	admln	edmln	admln	admln	admln	admln	New L.Jiaders	tchr/admlnoptions	tdlr/admin options
13-Jul	M	relay	lit for all	sec lit	sec math	elemss/ss		culture		GR bootcamp	
14-Jul	T	relay	lit for all	seclit	sec math	elemsci/ss		culture	Teacher Mgmt. Intensive (All newPrin/APs/ASL/ASLSS)	GR boatcamp	
15-Jul	W	relay	litforall	secllt	sec math	elemss/ss		culture	Teacher Mgmt. Intensive (All newPrin/APs/ASL/ASLSS)	GR boatcamp	
16-Jul	Th	relay	lit for all	secllt	sec math	elemss/ss		culture	Teacher Mgmt. Intensive (All newPrin/APs/ASL/ASLSS)		k-2lit deepdive
17-Jul	F	relay	lit for all	seclit	sec math	elemso./ss		culture			k-2 litdeepdive
20-Jul	M	rel-v		sechis	secsci	3-6mathnew	k-2rdlnew	RTII follday training			
21-Jul	T	relay		sechis	secsci	3-6mathnew	k-2rdgnew	3-12 lit l interventions	Teacher Mgmt. Intensive (All newPrin/APs/ASL/ASLSS)		
22-Jul	W	relay		sechis	secsci	3-6 mathnew	k-2rdi;new	3- U r l l interventions	Teacher Mgmt. Intensive (All newPrin/APs/ASL/ASLSS)		
23-Jul	Th	relay		sechis	secsci	3-6math	k-2rllR	3-12 lit Interventions	Teacher Mgmt. Intensive (All newPrin/APs/ASL/ASLSS)		
24-Jul	F	rel_1y		sechis	secsci	3-6math	k-2rdg				
27-Jul	M			3-9		k-2mathnew	3-6rdg new	3-12 math interventions			
21-Jul	T			3-9wt!		lt-2 math new	3-6 rda new	3-12 math intervention	Teacher Mgmt. Intensive (All newPrin/APs/ASL/ASLSS)		
29-Jul	W			3-9wt!			3-6rd<new	3-12 math Interventions	Teacher Mgmt. Intensive (All newPrin/APs/ASL/ASLSS)		
30-Jul	Th			3-9wt!		1-2 math	3-6rdg		Teacher Mgmt. Intensive (All newPrin/APs/ASL/ASLSS)		
U Jul F				3-9...q		k-2 math	3-6rdg				

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Category	Inputs	Calculation	Timeframe	Frequency	Threshold	Collection	RP1
Attendance & Retention (note data updated as of...)	Average Daily Attendance	Calculation same as mission metric only fo	Current Qtr & YTD	Weekly	ES threshold MS threshold HS threshold	Data team	
	95% Attendance	Pct of students >= 95% attendance for their enrolled days for kids enrolled in timeframe	Current Qtr & YTD	Weekly		Data team	
	Average Daily Promptness	Calculation same as mission metric only fo	Current Qtr & YTD	Weekly		Data team	
	Student Retention Rate	Calculation same as region report but only	Current Qtr & YTD	Weekly		Data team	
Suspension	Suspension Rate	Similar to mission metric but only includin	Current Qtr & YTD	Weekly		Data team	
	% Zero Suspension	Pct of students with zero suspension days in timeframe - only for kids enrolled in timeframe	Current Qtr & YTD	Weekly		Data team	
	AA suspension equity	Ratio of: pct of AA students with a suspension and pct of all students with a suspension day - only for students enrolled in timeframe	Current Qtr & YTD	Weekly		Data team	
	IEP suspension equity	Ratio of: pct of IEP students with a suspension and pct of all students with a suspension day - only for students enrolled in timeframe	Current Qtr & YTD	Weekly		Data team	
	Male suspension equity	Ratio of: pct of male students with a suspension and pct of all students with a suspension day - only for students enrolled in timeframe	Current Qtr & YTD	Weekly		Data team	
Staff Morale	Staff Retention	Defined by HR	Current Qtr & YTD	Quarterly		Entered by HR	
	Insight Survey	Defined by HR	Twice yearly	Twice yearly		Entered by HR	
Student Experience	Pass/Fail Rate	For grades 9-12, pct of students failing one	Current Qtr & YTD	Post report card		Data team	
	Student Survey	Average student survey score for school	Twice yearly	Twice yearly		Data team	
	BM Participation	Percent of courses that meet the BM thre	Current Qtr & YTD	Quarterly		Data team	
Academic Program	EC Participation	Defined by Justin	Current Qtr & YTD	Quarterly		Entered by Justin	
	K-2 Reading program fidelity	Qualitative	Current Qtr	Quarterly		Entered by Molly	
	3-8 reading program fidelity	Qualitative	Current Qtr	Quarterly		Entered by Molly	
	3-8 math program fidelity	Qualitative	Current Qtr	Quarterly		Entered by Molly	
	9-12 reading program fidelity	Qualitative	Current Qtr	Quarterly		Entered by Molly	
	9-12 math program fidelity	Qualitative	Current Qtr	Quarterly		Entered by Molly	
School Climate	Student/Staff Interactions	Qualitative	Current Qtr	Quarterly		Entered by John W	
	Modes of Operation	Qualitative	Current Qtr	Quarterly		Entered by John W	
	Instructional Foundations	Defined by Regionals	Current Qtr	Quarterly		Entered by RSOs	
	% Students "at risk"	Use social workers at risk report calculatio	Current Qtr & YTD	Weekly		Data team	
Specialized Services	Legal	Qualitative	Current Qtr	Quarterly		Entered by Elizabeth	
	File Audit	Qualitative	Current Qtr	Quarterly		Entered by Elizabeth	
	RTII	Qualitative	Current Qtr	Quarterly		Entered by Elizabeth	
	Specialized Program	Qualitative	Current Qtr	Quarterly		Entered by Elizabeth	
Operations	SIS Alignment	As calculated by Lori	Monthly	Monthly		Entered by Lori	
	Enrollment	Percent of budget enrollment	Weekly	Weekly		Data team	
HR & Compliance	Clearances	Percent of staff who have all clearances	Current Qtr & YTD	Quarterly		Entered by HR	



School Sorter

		Evaluation Score			The expectations for effective teaching are clearly defined at my school. (Index)			At my school, evaluation ratings are accurate reflections of teacher effectiveness.			
Mastery Site Average		6.7	7.6	7.3	63%	79%	71%	39%	53%	48%	70%
Mastery Top Quartile		7.8	8.0	8.1	81%	91%	86%	60%	66%	67%	85%
Mastery Elementary Schools Average		7.1	7.8	7.3	71%	81%	73%	46%	58%	49%	76%
Mastery Secondary Schools Average		6.3	7.3	7.2	53%	76%	70%	32%	45%	46%	63%
School	Grades Served	EOY15	MY16	EOY16	EOY15	MY16	EOY16	EOY15	MY16	EOY16	EOY15
Clymer Elementary	Elementary	6.0	8.1	7.4	39%	89%	74%	19%	79%	47%	56%
Cramer Hill Elementary	Elementary	8.5	8.5	8.7	80%	92%	100%	60%	77%	80%	100%
East Camden Middle	Elementary		7.4	7.2		70%	62%		55%	62%	
Francis D. Pastorius Elementary	Elementary	6.6	7.0	5.4	72%	63%	38%	33%	37%	11%	75%
Frederick Douglass Lower	Elementary		7.4	6.4		68%	53%		54%	19%	
Frederick Douglass Upper	Elementary		8.0	7.7		94%	83%		61%	53%	
Grover Cleveland Lower Campus	Elementary	7.8	8.1	7.7	90%	89%	81%	64%	69%	59%	81%
Grover Cleveland Upper Campus	Secondary	5.4	8.3	7.5	38%	93%	93%	15%	87%	36%	62%
Hardy Williams Elementary	Elementary	6.8	7.5	6.6	68%	73%	48%	42%	43%	38%	76%
Hardy Williams High	Secondary	6.1	6.0	6.0	68%	51%	41%	31%	24%	35%	59%
Harrity Elementary Lower	Elementary	6.7	7.7	7.5	68%	82%	72%	38%	54%	31%	75%
Harrity Elementary Upper	Secondary	6.5	7.2	8.0	67%	89%	83%	28%	44%	72%	56%
Lenfest Campus	Secondary	5.7	7.9	7.8	31%	92%	78%	28%	56%	49%	47%
Mann Elementary	Elementary	7.9	8.3	8.1	81%	94%	88%	56%	75%	64%	84%
Mastery Charter Prep Middle School	Secondary	6.6	7.0	6.6	67%	63%	68%	53%	33%	50%	80%
McGraw Elementary	Elementary		8.8	8.0		86%	86%		76%	68%	
Molina Elementary	Elementary		6.6	6.4		73%	69%		24%	33%	
North Camden Elementary	Elementary	6.8	7.6	7.8	63%	83%	86%	42%	45%	62%	71%
Pickett Campus	Secondary	6.9	7.2	7.5	57%	79%	74%	41%	43%	44%	71%
Shoemaker Campus	Secondary	6.5	7.8	7.5	56%	78%	76%	33%	53%	58%	58%
Simon Gratz Campus - Lower	Secondary	5.6	7.2	7.2	31%	69%	44%	15%	29%	36%	48%
Simon Gratz Campus - Upper	Secondary	6.5	7.2	7.4	59%	71%	71%	28%	47%	39%	66%
Smedley Elementary	Elementary	7.3	7.9	8.2	78%	79%	81%	55%	61%	73%	78%
Thomas Elementary	Elementary	7.8	7.8	6.9	77%	79%	67%	65%	63%	38%	84%
Thomas High	Secondary	7.0	7.2	6.9	73%	76%	67%	40%	37%	36%	75%

Evaluation													
I know the criteria that will be used to evaluate my performance as a teacher.		I agree with the criteria that will be used to evaluate my performance as a teacher.			The teacher evaluation process helps identify my strengths and weaknesses.			The person who evaluates my performance has an accurate perception of my classroom practice.			The person who evaluates my performance knows how much growth and progress my students have made this year.		
86%	83%	46%	56%	50%	51%	63%	57%	51%	70%	66%	62%	67%	71%
90%	90%	64%	64%	62%	73%	77%	74%	65%	75%	79%	73%	73%	83%
89%	85%	55%	61%	53%	57%	67%	59%	52%	71%	64%	64%	72%	70%
82%	79%	35%	47%	46%	43%	57%	54%	51%	68%	68%	59%	61%	73%
MY16	EOY16	EOY15	MY16	EOY16	EOY15	MY16	EOY16	EOY15	MY16	EOY16	EOY15	MY16	EOY16
89%	84%	22%	68%	53%	31%	84%	55%	39%	74%	64%	39%	71%	72%
100%	100%	70%	85%	80%	90%	85%	90%	60%	77%	90%	80%	85%	90%
91%	100%		73%	46%		55%	62%		64%	62%		82%	62%
92%	65%	53%	58%	27%	44%	50%	22%	33%	50%	35%	42%	45%	38%
92%	84%		43%	34%		57%	41%		65%	41%		62%	56%
94%	94%		56%	50%		83%	78%		72%	61%		83%	78%
85%	81%	57%	72%	53%	69%	79%	66%	67%	79%	84%	74%	74%	88%
87%	86%	31%	67%	64%	46%	80%	57%	31%	80%	64%	46%	60%	79%
90%	66%	66%	48%	52%	43%	53%	43%	53%	75%	55%	66%	75%	62%
76%	76%	31%	32%	35%	44%	43%	35%	47%	41%	45%	53%	41%	42%
87%	92%	35%	41%	36%	48%	59%	54%	48%	82%	82%	68%	72%	85%
72%	83%	44%	33%	50%	39%	56%	67%	39%	78%	83%	67%	67%	89%
94%	84%	42%	61%	53%	39%	72%	65%	39%	64%	76%	47%	56%	81%
94%	88%	72%	72%	67%	66%	81%	70%	66%	78%	76%	72%	78%	76%
81%	68%	27%	37%	36%	60%	41%	56%	67%	70%	52%	80%	59%	64%
90%	91%		71%	73%		76%	73%		90%	59%		90%	73%
73%	69%		46%	33%		49%	44%		46%	36%		49%	47%
86%	86%	63%	61%	66%	54%	55%	62%	38%	59%	69%	54%	62%	76%
79%	86%	49%	48%	54%	44%	61%	58%	59%	71%	84%	64%	64%	82%
90%	82%	44%	67%	58%	44%	71%	71%	51%	71%	78%	53%	65%	78%
85%	72%	19%	46%	40%	15%	53%	44%	41%	69%	61%	56%	71%	69%
77%	75%	34%	48%	43%	44%	48%	50%	59%	55%	79%	59%	58%	86%
90%	92%	57%	63%	71%	62%	67%	77%	65%	85%	78%	69%	85%	78%
84%	83%	63%	65%	52%	79%	77%	54%	67%	67%	65%	72%	62%	67%
82%	78%	43%	34%	28%	53%	47%	36%	63%	76%	61%	73%	71%	61%

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Internal Revenue Service
P.O. Box 2508
Cincinnati, OH 45201

Department of the Treasury

Date: **FEB 08 2007**

MASTERY CHARTER HIGH SCHOOL
% SCOTT GORDON
35 SOUTH 4TH STREET
PHILADELPHIA PA 19106

Person to Contact:

Barb Herald
ID #31-02637

Toll Free Telephone Number:

877-829-5500

Employer Identification Number:

23-3060542

Dear Sir or Madam:

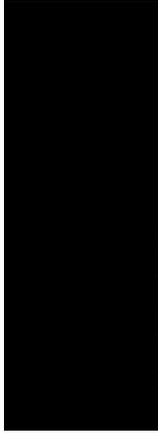
This is in response to your request of October 13, 2006, regarding your tax-exempt status. We have updated our records to reflect the name change as indicated above.

Our records indicate that a determination letter was issued in November 2001 that recognized you as exempt from Federal income tax. Our records further indicate that you are currently exempt under section 501(c)(3) of the Internal Revenue Code.

Our records also indicate you are not a private foundation within the meaning of section 509(a) of the Code because you are described in section 509(a)(1) and 170(b)(1)(A)(ii).

Donors may deduct contributions to you as provided in section 170 of the Code. Bequests, legacies, devises, transfers, or gifts to you or for your use are deductible for federal estate and gift tax purposes if they meet the applicable provisions of sections 2055, 2106, and 2522 of the Code.

If you have any questions, please call us at the telephone number shown in the heading of this letter.



Barb Herald
Manager, Exempt Organizations
Determinations



**The School District of Philadelphia
Charter Schools Office
440 North Broad Street, 1st Floor
Philadelphia, PA 19130**

*Tel: 215-400-4090
Fax: 215-400-4091*

July 13, 2016

Venitia Richardson
Director, Teacher Quality Programs
Office of Innovation and Improvement
US Department of Education
Washington, DC 20202

Dear Ms. Richardson,

The Charter Schools Office was asked by Mastery Charter Schools Network to provide this letter to confirm the LEA status of the following charter school LEAs authorized by the School District of Philadelphia. Under state law in Pennsylvania, the local school district is the charter authorizer for any brick and mortar charter school founded and operated solely within its borders. The Mastery Charter Schools Network includes 14 LEAs currently authorized by the School District of Philadelphia and under a charter agreement as listed below.

1. Mastery Charter High School (locally identified as Mastery Charter School Lenfest Campus)
2. Mastery Charter School Thomas Campus
3. Mastery Charter School Shoemaker Campus*
4. Mastery Charter School Pickett Campus
5. Mastery Charter School Harrity Elementary
6. Mastery Charter School Mann Elementary
7. Mastery Charter School Smedley Elementary
8. Mastery Charter School Clymer Elementary*
9. Hardy Williams Academy Mastery Charter School
10. Mastery Charter School Simon Gratz Campus*
11. Grover Cleveland Elementary Mastery Charter School
12. Francis D. Pastorius Mastery Charter School
13. Frederick Douglass Mastery Charter School
14. John Wister Mastery Charter School**

*Charter agreement expired June 30, 2016 but remains in force

**Charter school authorized effective July 1, 2016; will open for the 2016-17 school year

In addition to the 14 LEAs listed above, Mastery Charter Schools Network had an application approved by The School District of Philadelphia during the 2014-15 application year for a new charter school - Mastery Charter School Gillespie Campus. At this time, the approval of this proposed charter school has not been finalized with an executed charter agreement. The charter school will not be open for the 2016-17 school year. Any future brick and mortar charter schools sought by the Mastery Charter Schools Network located in Philadelphia would need to be authorized by the approval of a formal charter application and charter agreement by the School Reform Commission of The School District of Philadelphia.



Dawn Lynne Kacer
Executive Director, Charter Schools Office, The School District of Philadelphia



State of New Jersey
DEPARTMENT OF EDUCATION
PO Box 500
TRENTON, NJ 08625-0500

CHRIS CHRISTIE
Governor

KIM GUADAGNO
Lt. Governor

DAVID C. HESPE
Commissioner

July 12, 2016

Venitia Richardson
Director, Teacher Quality Programs
US Department of Education
Office of Innovation and Improvement
400 Maryland Avenue, SW
Washington, DC 20202-5960

Dear Ms. Richardson,

This letter is to confirm the LEA status of Mastery Schools of Camden, Inc., a renaissance school project authorized by the New Jersey Department of Education (NJDOE). Pursuant to N.J.S.A. 18A:36C-15, a renaissance school project shall be a local education agency only for the purpose of applying for federal entitlement and discretionary funds.

Please do not hesitate to contact Julie McAloon at [REDACTED] with any further questions.

Sincerely,

Colleen Schulz-Eskow
Deputy Chief of Government Affairs

RESTRICTED INDIRECT COST RATE CERTIFICATION

APPLICABLE TO FISCAL YEAR JULY 1, 2015 THROUGH JUNE 30, 2016
 BASED ON ANNUAL FINANCIAL REPORT FOR YEAR ENDING JUNE 30, 2014

Commonwealth of Pennsylvania
 Department of Education
 333 Market Street
 Harrisburg, PA 17126

1-26-51-000-2
 Mastery CHS - Lenfest Campus

-----> **ALLOCATIONS** <-----

Func-Obj	Description	Amount
1000 - 000	Instruction	8,058,046.00
2100 - 000	Support Services - Pupil Personnel	935,616.00
2200 - 000	- Instructional Staff	3,907,644.00
2300 - 000	- Administration	5,895,195.00
2400 - 000	- Pupil Health	64,383.00
2500 - 000	- Business	1,532,733.00
2600 - 000	- Operation & Maint	1,266,289.00
2700 - 000	- Student Transp Svcs	3,753.00
2800 - 000	- Central	1,396,113.00
2900 - 000	- Other Support Service	0.00
3000 - 000	Oper of Non-Instruct Svcs	401,131.00
4000 - 000	Facilities Acquisition, Constr & Improv	0.00
5100 - 000	Other Financing Uses - Debt Service	0.00
5200 - 000	- Fund Transfers	0.00
	Total Oper Expenses - Food Svc Fund	0.00
	- Oth Enterprise Fund	0.00
	Total Allocations ----->	A 23,460,903.00

-----> **ELIMINATIONS** <-----

Func-Obj	Description	General Fund Expenditures	Amount
1000 - 322	Instruction - Prof Edu Svc	IU	0.00
- 323	Instruction - Prof Edu Svc - Oth Edu Agy		0.00
- 560	Instruction - Tuition		0.00
- 700	- Property		67,311.00
1200 - 594	- Spec Prog - IU Svc		0.00
- 597	- IC Spec Prog - IU Svc		0.00
1807 - 000	Pre-K Pass thru		0.00
2100 - 700	Support Svc - Pup Per - Property		0.00
2200 - 700	- Ins Stf - Property		0.00
2300 - 700	- Admin - Property		0.00
- 820	- Judgements		0.00
2400 - 700	- Pup Hlth - Property		0.00
2500 - 700	- Business - Property		0.00
2600 - 700	- Op & Mnt - Property		71,753.00
2700 - 700	- Stu Trn Svcs - Property		0.00
2800 - 700	- Central - Property		3,254.00
2900 - 595	- Oth Sup Svcs - IU Withhold		0.00
- 596	- IU Dir Pay		0.00
- 700	- Property		0.00
2990 - 899	- Pass Thru		0.00
3000 - 700	Oper of Non-Instruct Serv - Property		12,500.00
3100 - 571	Food Serv Mgmt - Food		157,635.00
- 630	- Food		0.00
4000 - 000	Facilities Acquisition, Constr & Improv		0.00
5100 - 000	Oth Fin Uses - Debt Serv		0.00
5220 - 000	- Fund Tran - Spec Rev		0.00
5230 - 000	- Cap Proj		0.00
5240 - 000	- Debt Serv		0.00
5250 - 000	- Enterprise		0.00
5260 - 000	- Intrnl Serv		0.00
5270 - 000	- Trust & Agncy		0.00
5280 - 000	- Activity Fund		0.00
	Depreciation - Food Svc Fund		0.00
	- Other Enterprise		0.00
	Claims + Judgements - Food Svc Fund		0.00
	- Other Enterprise		0.00
	Total Eliminations ----->		B 312,453.00

-----> INDIRECT COSTS <-----

Func-Obj	Description	Amount
2300-000	Administration - General Audit	0.00
2310-000	Administration - Business Manager	0.00
2500-000	Business	1,532,733.00
2830-000	Central - Staff Services	0.00
2840-000	Central - Data Processing	1,392,859.00
xxxx-115	Termination Leave/Payouts (excludes functions above)	221,089.00
Total Indirect Costs ----->		C 3,146,681.00

-----> COMPUTATIONS <-----

Actual 2013-14 Indirect Costs	C	3,146,681.00
Actual 2013-14 Base for Allocation	A-B-C	20,001,769.00
Applicable 2013-14 Restricted Indirect Cost Rate		0.0800 D

2013-14 Carry-Forward Adjustment

Actual 2013-14 Indirect Costs	C	3,146,681.00
2011-12 Carry-Forward Adj - (O)/U Recovery		1,492,238.65 E
2013-14 Indirect Costs for Carry-Forward Adj	C + E	4,638,919.65 F
2013-14 Estimated Indirect Costs	(A-B-C)*D	1,600,141.52 G
2013-14 Carry-Forward Adj - (O)/U Recovery	F - G	3,038,778.13 H

Restricted Indirect Cost Rate Applicable to 2015-16

Actual 2013-14 Indirect Costs	C	3,146,681.00
2013-14 Carry-Forward Adj - (O)/U Recovery	H	3,038,778.13
2013-14 Indirect Costs for Rate Calculation	C + H	6,185,459.13 I
Restricted Indirect Cost Rate for 2015-16	I/(A-B-C)	<u>0.0800</u>

APPROVED BY PENNSYLVANIA DEPARTMENT OF EDUCATION

SIGNATURE : Danielle A. Mariano
 TITLE : Director, Bureau of Budget and Fiscal Management
 DATE : 12/2/2015

Budget Narrative File(s)

* **Mandatory Budget Narrative Filename:**

To add more Budget Narrative attachments, please use the attachment buttons below.

BUDGET NARRATIVE

1. Detail narrative on spending line items
 - a. Grant Funded Aligned with Section A-Form 524 pp. 1-7
 - b. Non-Federal Funds Aligned with Section B- Form 524 pp.8-9
2. Funding Matrix Worksheet by Line Item pp. 10-12
3. TOTAL Project Costs by year and total pp. 13

Mastery Charter Schools is requesting \$16,720,732 in grant funds to align with \$20,561,319 in non-Federal funds contributed by Mastery schools to support the Mastery 3.0 Opportunity Culture Human Capital Systems Redesign Project (MOCHCS). This project will impact more than 1,200 educators each year and an average of 15,000 students each year in high needs schools each year.

GRANT FUNDED BUDGET NARRATIVE

In the Personnel section we will provide narrative detail about each role as presented in the program narrative. We will then include a complete chart by line item, number of personnel by type, cost per position, with the grant or non-federal funding.

1. PERSONNEL Expenditures

Mastery Charter Schools is requesting partial funding for multiple full time and part time staff over the next five years to implement the TIF project across 31 schools and serving between 13,000 and 16,000 students each year of the grant (average impact will be 15,000/year). Full time salaries over multiple years include a 3% inflation index in the salaries each year.

Overall Grant Management

PROJECT DIRECTOR: Will be our current ChiefInnovation Officer and she will serve 20% of her time on the TIF grant through grant funds. The PD will be responsible for overall leadership for communication with USDOE, grant compliance and project oversight with the Program Manager (CTO). Her qualifications are summarized in the program narrative and a bio is attached in the Appendix D. The PD cost is calculated at 20% of the CIO's base salary of \$160,000 at a total cost to the grant of \$169,892 over five years. She is only funded at 20% time as the CTO (listed below) will serve as the day to day program implementer, while the PD will be responsible for communication with USDOE, grants compliance and big picture issues. This management structure has worked well for Mastery in the past on large federal grants.

CHIEF TALENT OFFICER: Will be responsible for day to day program design and implementation of the grant, with a focus on the Talent Management Systems implementation

and the revisions to the PBCS. This will be a new, cabinet level position at Mastery to ensure that communication across teams and implementation is a high level network priority. This position is critical to our ability to effectively implement the project, including our revised PBCS with fidelity. The position will remain 100% over all five years of the grant, however, the salary will be fully funded by TIF in years 1-3 and will phase to 50% grant and 30% grant in years 4 and 5 on the way to full sustainability on network funds. The salary is calculated at a FT rate of \$160,000 at a full cost to the grant of \$622,122.

Recruitment Area Staffing

RECRUITMENT TEAM (Assistant Director, Leadership; Assistant Director, Teachers; Program Manager Leadership Recruitment). These staff will bring our Recruitment team added capacity to focus on recruitment of higher quality teachers and leaders with a focus on hard to staff positions, experienced school leaders, and educators with capacity to serve in school support or program management roles under TIF. The positions will be 50% time in year 1, 100% time in years 2-3, and reduce to 2 FTEs in year 4 and 0 FTEs in year five as these functions become sustained at Mastery without grant funds. The salary is calculated at a FT rate of \$85,000 for Assistant Directors and \$51,000 for Program Managers at a total cost to the grant over five years of \$703,412.

DIRECTOR, NEW TEACHER RESIDENCY/RELAY & PIPELINE DEVELOPMENT: This role would own Mastery's partnership with RELAY Graduate School of Education to design and implement a new teacher residency program for hard to staff subjects. The role would be full time in years 2-3 of the grant, and 50% time in years 4-5 as this function is fully sustained after the grant period. The position is calculated at \$100,000 per year as we need skilled instructional leader for this role and will be a total cost to the grant of \$310,681 for the project.

DATA ANALYTICS MANAGER, PIPELINE: This position would be focus on creating platforms to collect, analyze and provide direction on how to use human capital data. The Analytics Manger will create the capacity to conduct ongoing data analytics for predicting recruitment outcomes, targeting efforts, and testing the types of educator development and PBCS that most impact teacher quality for types of incoming hires. The role will be 25% time in year 1, full time in years 2-4 and phased out in year 5 as we project the predictive data analytics project for recruitment will be complete and we will be able to manage data collection and use going forward. The FTE rate for this role is \$92,000 and the cost to the grant will be \$307,363 over the life of the project.

NEW TEACHER RESIDENTS - SECONDARY MATH, SCIENCE, SPECIAL ED: One large investment we are seeking to make is in hiring a diverse cadre of new teacher residents with RELAY to strengthen and diversify our teacher pipeline. We would use grant funds to support 12 residents in years 2 and 3 (with a 20% salary from year 1 due to 4th quarter hiring), then phase down to 8 and then 6 Residents out of grant funds in years 4 and 5. The plan is to provide the

Residency Director and our secondary school principals the time to test the model and create a budget and scheduling model that accommodates residents in high schools. The residency would then be sustained on school budgets after the grant. The cost of a resident is \$37,000 per year and we have budgeted a five year cycle of 0, 12, 12, 8, 6 on grant funds at a total grant cost of \$1,494,800 over the life of the project.

Talent Management System Development

We will need four temporary staff roles to implement our proposed Talent Management System design and implementation to support PBCS and improvements in the quality of human capital at Mastery.

TMS IMPLEMENTATION MANAGER-TECHNOLOGY: We would hire a skilled data systems expert to reside in house for 3 years to oversee the technology and data build out and implementation of the new TMS. This person would also oversee the vendor selected for build out. This position phases out after three years of grant funding and will no longer be needed. This position is budgeted at \$85,000 and we will spend \$245,109 in grant funds on this role over the life of the grant.

TMS IMPLEMENTATION MANAGER- BUSINESS PROCESS: A parallel role would be created with an existing Mastery staff person who knows our operations who could shift into this role for 3 years to determine the business and process rules that will drive the new TMS. This person must be a skilled subject matter expert and will work collaboratively with the Technology Manager, the vendor, and the CTO. This position phases out after three years of grant funding and will no longer be needed. This position is budgeted at \$65,000 and we will spend \$187,436 in grant funds on this role over the life of the grant.

HUMAN RESOURCES MANAGER: Hired full time in years 1-3 of the grant and phased out in year 4 as our strategic budget plan for the network allows for the full time hire of this role with operating funds in year 4 as we add more schools. This position will work directly on the school side on analyzing school level data and supporting teachers in the PBCS. The position is budgeted at \$75,000 per year and will be a five year grant cost of \$227,250.

DATA COORDINATOR, TMS: This role will be added part time in year 1 and full time in years 2-4 to work collaboratively with the CTO and the program teams to ensure that the data we need to analyze for the TMS roll out and revision to PBCS is entered into the system. The position will be eliminated after year 4 when the full TMS implementation is complete as capacity for data coordination will be absorbed into a growing HR team by year 5. The position is budgeted at \$40,000 and we will spend \$143,636 in grant funds on this function.

Educator Development Staffing

REGIONAL SCHOOLS OFFICER-APPRENTICE SCHOOL LEADERS: We will hire a FT RSO to serve 75% time to design and implement a comprehensive Apprentice School Leader program at Mastery. Mastery currently has an ASL model with no formal structure around training, supports, learning outcomes, or the role they should play in schools during the apprentice year. This RSO will be a seasoned Principal who will take a reduced load of schools to supervise so they can spend 75% time in 2 and 3 of the grant on ASL design, implementation and management. The position will phase to 50% time in year 4 and 25% time in year 5 as we fully phase a mature program into the hands of our existing RSO team. This position is budgeted at \$152,000 and we will spend \$361,034 in grant funds on this function during the grant.

DIRECTOR, FUTURES PROGRAM: This position will allow a seasoned educator to design and implement our new teacher leader program. The position will require a design phase and shift to model development including curriculum, recruitment of candidates and mentors, and management of the program. Design will be intentional about how the program can operate within Mastery's structure once a model is built so that management can be phased to one or more network leaders. We are seeking funding for 25% time year one, 100% time in years 2-4 and phasing to halftime in year 5. This position is budgeted at \$90,000 and we will spend \$349,854 in grant funds on this function over five years.

APPRENTICE SCHOOL LEADERS: As the RSO, ASLs brings up an effective apprentice school leader program, Mastery will hire and train 2 full time ASLs each year with grant funds. These roles will help train staff to be ready to lead the following year in any Mastery school. The grant will fund two of these positions at 25% in year one (they will start in July 2017) and at 100% in years 2-5. (See PART B for Non TIF funds in this area) The network model calls for Mastery to have up to five ASLs on operating funds in FY 22 forward as we expand at a faster rate and can afford more ASLs. ASLs are budgeted at \$90,000 and we are requesting \$798,053 in grant funds over five years to support the program.

SCHOOL SUPPORT COACHES: Mastery will hire and deploy a cadre of content-experts as school support coaches to work directly with teachers 1:1 and in groups on implementation of the curriculum and improving their teaching skill in their area of expertise. Mastery will hire and deploy SSCs across all areas K-2, 3-8 Math, 6-12 Math, 3-8 Humanities (ELA), 6-12 Humanities, 3-8 Science and 6-12 Science as a part of our new strategic plan launch aligned with TIF 5. Mastery will support the full cost of 12 FTE coaches with the grant providing between 3-5 FTEs each year as seen in the budget table. We will earmark the additional coaches for our highest to staff/lowest outcome subjects starting with K-2, 3-8 and 6-12 math, and 6-12 science - with the ability to make staffing changes over the life of the grant based on student/teacher need. We will hire 5 coaches at 25% time in year one (need time to recruit, train and deploy), 5@ 100% time in years 2-4 and phasing down to 3 coaches on the grant in year 5 as we move to sustainability. Coaches are budgeted at \$80,000 per FTE and we are requesting \$1,598,614 in grant funds over five years to support this initiative.

Incentive Comp - PBCS and Recruitment/Retention Incentives

PBCS INCENTIVE COMPENSATION PAYOUTS FOR TEACHERS AND LEADERS: Based on our current PBCS we are budgeting \$75,000 per school for teacher payouts and \$15,000 for leadership team payouts. The full cost of PBCS payouts for teachers and leaders in schools open more than one year in FY I 7 will be paid in full by Mastery operating funds. The personnel funding table in this section shows the number of schools open each year with 24 mature schools out of 26 starting at full Mastery investment in year two and two new schools who will receive TIF grant funds for will support one year of PBCS payouts at 7 out of 31 schools projected to participate over the life of the grant. TIF dollars are requested to cover the cost of PBCS at new schools where they have not been able to get to scale on an operating budget and will run a deficit if they attempt to pay out on PBCS in year one. The grant would pay 100% of incentive comp at these new schools in year I they are on the grant. Over the five years we are budgeting to spend \$525,000 on teacher payouts and \$105,00 in leader payouts out of TIF grant funds - a total request of \$630,000 over five years. NOTE: in section be we detail how we are spending \$12.3 million in Mastery operating funds on PBCS payouts over this time as our commitment to paying for and sustaining this critical component of our program.

PIPELINE RECRUITMENT INCENTIVES - HARD TO STAFF SUBJECTS AND SCHOOLS Under the project our additional Recruitment Team staff will not only focus on bringing in great talent, but will work on the design and implementation of several new fiscal incentive programs to attract higher quality teachers and leaders. We are budgeting \$1.0lmm in grant funds over five years to support structured recruitment incentives for at least 90 hard to staff teaching roles and 38 high quality leadership positions in schools. The total cost of these incentives is budgeted at an average of \$10,000 per leader and \$7,000 per teacher per year by phasing in the incentive and phasing it back out on the path to sustainability in year five. We are requesting \$1,010,000 in grant funds over five years to support these incentives.

RETENTION INCENTIVES: Through the work of the TIF Mastery Teacher Collaborative we will design and implement an Opportunity Culture focused retention program for Master teachers that includes getting the highest quality teachers in front of more students, keeping Masters in the classroom, and helping to train and mentor new teachers through the network of selected Masters. We have budgeted \$567,000 in grant funds over five years to work with approximately 81 of our highest quality teachers on the retention initiative.

Total Grant and Mastery Allocation to Personnel:

Over the five years of the grant all Personnel expenditures detailed in this narrative including full and part time positions, teacher residents, Apprentice School Leaders, PBCS payouts, and targeted recruitment or retention incentive program stipends total **\$9,976,257 in Grant Funds.**

2. FRINGE:

The Mastery fringe rate on FTEs (and on fractional time for FTEs) is 32%. This totals **\$3,112,402 in grant funds** over five years for the positions and incentive comp listed in the narrative.

3. MATERIALS/SUPPLIES – We are not requesting funds for materials and supplies under the TIF grant.
4. TRAVEL – We are requesting the required allocation for TIF conference travel as noted in the application. This includes 3 people to the national meeting and 2 people to a topical meeting including \$400 for airfare, \$150pp for two nights in hotels, and a per diem of \$40pp for two days. **Total Travel allocation under the grant is \$19,500.**
5. CONTRACTS – We are seeking to enter into five contracted relationships for some part of the five years of TIF 5 at a **total grant expense of \$2,484,000.**

LEADERSHIP DEVELOPMENT TUITION: Cost of a contract with RELAY to pay for a portion of 10 leaders each year to attend their NPAF training and advanced certification year long program and summer institute. We are requesting \$305,000 in grant funds by providing between \$2500-\$10000 per candidate to participate in each year of the grant. We are planning to cover \$10,000 of the cost for each of 5 leaders in year 1, 10 leaders in year 2, and then to send 10 leaders in years 3-5 but with a decreasing share from TIF funds from 80% to 50% to 25% in year five to account for sustainability on operating funds over time.

TALENT MANAGEMENT SYSTEM IMPLEMENTATION: We will use a competitive RFP to select a high quality vendor to implement and provide our new TMS. We have budgeted \$1,524,000 for vendor costs over the life of the grant based on early estimates from several national vendors (e.g. ██████████) who have completed similar implementations of this size. The roll out would include \$340k in year 1, \$750k in year 2, \$400k in year 3 and a close out allocation of \$24k in year 4 with the costs of maintaining the system fully absorbed by Mastery in year 5.

M3/TAS PBCS DESIGN CONSULTANT: Our leadership team has requested grant funds to hire a seasoned expert in Performance Based Pay Systems design to support Mastery over 2.5 years of the project. Total grant funds requested are \$175,000 between years 1-3 of the grant (e.g. \$25k year one, \$100k year 2, \$50k year three when the PBCS is fully revised).

EXTERNAL EVALUATION: While this TIF 5 project will enable us to build and report on a wide array of data, we still believe that to verify the quality of implementation and which programs have the desired effect on teaching and learning, we would like to hire an external evaluator through RFP to work with our internal data team. We have budgeted less than a traditional 5% on external evaluation as our experience with past grants is that our internal team

has significant capacity to do much of the work that evaluators would otherwise need funds to complete. We are requesting \$510,000 in funds for external evaluation over the life of the grant.

RECRUITMENT COMMUNICATION STRATEGY: We are requesting \$60,000 over two years for our Pipeline Recruitment team to work with an industry expert in social media and communications to redesign and deploy our external messaging strategy focused on building our outreach to quality teachers and leaders. This is broken into two, \$30k allocations based on an average from industry proposals for this project.

TOTAL DIRECT COSTS: Under TIF 5 grant funds are \$15,342,159.

INDIRECT COSTS (8% rate- documentation in Appendix F): Under TIF 5 are \$1,227,373.

TRAINING STIPENDS: We proposed allocating \$2000 per pre-placement pipeline student via stipends over four years of the grant. This is a grant request of \$140,000 over four years.

TOTAL COSTS: Are **\$16,709,532 over five years.**

	Grant Year 1	Year2	Year3	Year4	Year 5	TOTAL TIF GRANT BUDGET
TOTAL COST	\$2,142,327	\$5,081,059	\$4,537,534	\$3,082,655	\$1,865,957	\$16,709,532

NON FEDERAL, NON-TIF FEDERAL FUNDS BUDGET NARRATIVE (PART B)

In the Personnel section we will provide narrative detail about each role as presented in the program narrative. We will then include a complete chart by line item, number of personnel by type, cost per position, with the non-federal funding. Positions that shift to operating funds over the life of the grant are made possible by our expansion strategy which allows us to afford more positions as we increase the size of the network over time.

a. PERSONNEL

CHIEF TALENT OFFICER: This is a new role that will be funded under TIF, however, it is our intent that this position becomes a part of Mastery over time. We have included a budget of \$\$207,257 in grant funds to cover 50% of salary in year 4 and 70% of salary in year 5 on our path to sustaining this critical human capital role. The funding source will be operating funds.

SCHOOL SUPPORT COACHES: Mastery will hire and deploy a cadre of content-experts as school support coaches to work directly with teachers 1:1 and in groups on implementation of the curriculum and improving their teaching skill in their area of expertise. Mastery will hire and deploy SSCs across all areas K-2, 3-8 Math, 6-12 Math, 3-8 Humanities (ELA), 6-12 Humanities, 3-8 Science and 6-12 Science as a part of our new strategic plan launch aligned with TIF 5. **Mastery will support the full cost of 6 FTE coaches using non-Federal funds.** Coaches funded by Mastery will be allocated based on greatest need across the 7 grade band/content areas included in the personnel budget table - with the ability to make staffing changes over the life of the grant based on student/teacher need. We will hire 6 coaches at 25% time in year one (need time to recruit, train and deploy), 6 @ 100% time in years 2-4 and increasing to 7 Mastery funded coaches on the grant in year 5 as we move to sustainability **at a cost of \$2,120,000 to Mastery over five years.** The personnel table does list an additional 6 Coach positions without funding listed. We will staff these positions as part of the project so reviewers should be aware of our intent; however, since we were unsure if we would be funding these with non-federal or with some non-TIF federal funds, we left the costs out of our share and the ED-524 out of caution. The funding source will be operating funds with some funds from Philadelphia Schools Partnership and/or Charter School Growth Fund possible as they are our two current major funders for expansion efforts.

APPRENTICE SCHOOL LEADERS: As the **RSO**, ASLs brings up an effective apprentice school leader program, Mastery will hire and train 2 full time ASLs each year with non-federal funds. These roles will help train staff to be ready to lead the following year in any Mastery school. Mastery will fund these positions at 25% in year one (they will start in July 2017) and at 100% in years 2-5. (See PART A for grant funds in this area) The network model calls for Mastery to support five or more ASLs on operating funds in FY 22 forward as we expand at a

faster rate and can afford more ASLs. The total Mastery non-federal allocation for ASLs will be \$765,000 over five years. Operating funds will support this function.

PBCS INCENTIVE COMPENSATION PAYOUTS FOR TEACHERS AND LEADERS: Based on our current PBCS we are budgeting \$75,000 per school for teacher payouts and \$15,000 for leadership team payouts. The full cost of PBCS payouts for teachers and leaders in schools open more than one year in FY 17 will be paid in full by Mastery operating funds. We will have 24 schools covered by non-federal funds in year 1 increasing to 30 by year 5. We have budgeted \$12,330,000 in PBCS payouts for teachers and leaders under this proposal as our commitment to paying for and sustaining this critical component of our program.

Over the five years of the grant all Personnel expenditures detailed in this narrative including full and part time positions, teacher residents, Apprentice School Leaders, PBCS payouts, and targeted recruitment or retention incentive program stipends total \$15,959,257 in Mastery non-Federal funds. 100% of PBCS payouts under the Mastery non-federal allocation will be operating funds.

HUMAN RESOURCES MANAGER: Hired full time in years 1-3 of the grant and phased out in year 4 as our strategic budget plan for the network allows for the full time hire of this role with operating funds in year 4 as we add more schools. This position will work directly on the school side on analyzing school level data and supporting teachers in the PBCS. The position is budgeted at \$75,000 per year and Mastery will pick up the full cost of this position to support TIF in years 4-5 of the grant at a total allocation of \$150,000. The funding source will be operating funds.

b. FRINGE Expenses

The Mastery fringe rate on FTEs (and on fractional time for FTEs) is 32%. This totals \$4,984,562 in Mastery non-federal funds to support fringe costs of staff under the project not-funded by the grant.

There are no additional non-federal funds contributed by Mastery to this grant outside of Personnel and Fringe.

TOTAL DIRECT COSTS -NON FEDERAL: Are \$20,561,319 over five years.

TOTAL COSTS ARE THE SAME AS DIRECT COSTS FOR THE NON-FEDERAL FUNDS.

	Grant Year 1	Year2	Year3	Year4	Year 5	TOTAL TIF GRANT BUDGET
TOTAL	\$3,069,000	\$3,960,000	\$4,197,600	\$4,530,401	\$4,804,318	\$20,561,319

GRANT FUNDS				\$2,142,327		\$3,041,059		\$4,497,534		\$3,042,655		\$1,845,957			
NON FEDERAL MASTERY					\$3,069,000		\$3,960,000		\$4,197,600		\$4,530,401		\$4,804,318		
				16 LEAs		17 LEAs		18 LEAs		19 LEAs		20 LEAs			
				26 schools in		28 schools		29 schools		30 schools		31 schools			
Funded Category				2017		2018		2019		2020		2021			
	Total# positions	Grant Funded	MCS Funded	Year 1 Grant	Non Federal Year 1	Total Grant Cost year 2	Non Federal Year2	Year3	Non Federal Year3	Year4	Non Federal Year4	Years	Non Federal Year 5	Five Year Grant Costs	Five Year Non Federal Costs
PERSONNEL															
Project Director	1	0	0.2	\$32,000		\$32,960		\$33,949		\$34,967		\$36,016		\$169,892	\$0
Chief Talent Officer -	1	1	0	\$160,000		\$160,000		\$164,800		\$84,872	\$84,872	\$52,450	\$122,385	\$622,122	\$207,257
														\$0	\$0
TALENT MANAGEMENT SYSTEMS/ PBCS															
TMS Implementation Manager - Technology	1	1	0	\$42,500		\$85,000		\$87,550		\$30,059		\$0		\$245,109	\$0
Manager - Data rules, business and process requirements	1	1	0	\$32,500		\$65,000		\$66,950		\$22,986		\$0		\$187,436	\$0
Human Resources	2	1	1	\$75,000		\$75,000		\$77,250		\$0	\$77,250	\$0	\$77,250	\$227,250	\$154,500
Data Coordinator	1	1	0	\$20,000		\$40,000		\$41,200		\$42,436		\$0		\$143,636	\$0
Teacher Incentive Comp				\$150,000	\$1,800,000	\$150,000	\$1,950,000	\$75,000	\$2,100,000	\$75,000	\$2,175,000	\$75,000	\$2,250,000	\$525,000	\$10,275,000
Leader Incentive Comp				\$30,000	\$360,000	\$30,000	\$390,000	\$15,000	\$420,000	\$15,000	\$435,000	\$15,000	\$450,000	\$105,000	\$2,055,000
Incentives - H2F Teachers (12ts, 24, 24, 12)- \$7k per	24	24	0	\$84,000		\$168,000		\$168,000		\$126,000		\$84,000		\$630,000	\$0
Line recruitment Incentives - H2F Leaders (50%/100/100/80/50) - \$10k/per	10	10	0	\$50,000		\$100,000		\$100,000		80000		\$50,000		\$380,000	\$0
Incentives - H2F Teachers (3, 24, 24, 18, 12) \$7k/per	24	24	0	\$21,000		\$168,000		\$168,000		\$126,000		\$84,000		\$567,000	\$0
														\$0	\$0
DEVELOPMENT - ACADEMIC SCHOOL BASED SUPPORT															
School Support Coaches														\$0	\$0
K-2	3	1	2	\$20,000	\$40,000	\$80,000	\$160,000	\$82,400	\$160,000	\$84,872	\$160,000	\$87,418	\$240,000	\$354,690	\$760,000
3-8 Math	3	1	2	\$20,000	\$40,000	\$80,000	\$160,000	\$82,400	\$160,000	\$84,872	\$160,000	\$87,418	\$160,000	\$354,690	\$680,000
6-12 Math	3	2	1	\$40,000	\$20,000	\$160,000	\$80,000	\$164,800	\$80,000	\$169,744	\$80,000	\$87,418	\$80,000	\$621,962	\$340,000
3-8 Humanities	3	0	3	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
6-12 Humanities	2	0	2	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
3-8 Science	1	0	1	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
6-12 Science	2	1	1	\$20,000	\$20,000	\$80,000	\$80,000	\$82,400	\$80,000	\$84,872	\$80,000	\$0	\$80,000	\$267,272	\$340,000
(excludes non-TIF, federal funded ASLs)	4	2	2	\$45,000	\$45,000	\$180,000	\$180,000	\$185,400	\$180,000	\$190,962	\$180,000	\$196,691	\$180,000	\$798,053	\$765,000

				16 LEAs		17 LEAs		18 LEAs		19 LEAs		20 LEAs			
				26 schools in		28 schools		29 schools		30 schools		31 schools			
Funded Category				2017		2018		2019		2020		2021			
	Total# positions	Grant Funded	MCS Funded	Year1 Grant	Non Federal Year 1	Total Grant Cost year 2	Non Federal Year2	Year3	Non Federal Year3	Year4	Non Federal Year4	Year 5	Non Federal Year 5	Five Year Grant Costs	Five Year Non Federal Costs
														\$0	\$0
														\$0	\$0
														\$0	\$0
PD - Leadership Training														\$0	\$0
RSO - ASL Program (75%)	1	0.75	0.25	\$38,000		\$114,000		\$117,420		\$60,471		\$31,143		\$361,034	\$0
Director, Futures	1	1	0	\$22,500		\$90,000		\$92,700		\$95,481		\$49,173		\$349,854	\$0
														\$0	\$0
TALENT PIPELINE														\$0	\$0
Residency & Pipeline Development	1	1	0	\$0		\$100,000		\$103,000		\$53,045		\$54,636		\$310,681	\$0
Recruitment (1Teachers, 1 Leaders)	2	2		\$85,000		\$170,000		\$175,100		\$90,177		\$0		\$520,277	\$0
Program Mgr,	1	1		\$25,500		\$51,000		\$52,530		\$54,106				\$183,136	\$0
Com municat io ns Miiager														\$0	\$0
D;fta Analytics Manager	1	1		\$23,000		\$92,000		\$94,760		\$97,603		\$0		\$307,363	\$0
(s onda ry math/sped) - 2;(1 2, 12, 8, 6	6to 12	6to 12	0	\$88,800		\$444,000		\$444,000		\$296,000		\$222,000		\$1,494,800	\$0
														\$0	\$0
														\$0	\$0
														\$0	\$0
F GE (@ 32% FTE)				\$359,936	\$744,000	\$868,787	\$960,000	\$855,875	\$1,017,600	\$639,848	\$1,098,279	\$387,956	\$1,164,683	\$3,112,402	\$4,984,562
														\$0	\$0
MATERIALS/SUPPLIES														\$0	\$0
														\$0	\$0
TRAVEL														\$0	\$0
(1.5 days, 3 ppl, \$400pp air, \$150pp hotel x 2 nights, per diem of \$40 pp x 2 days) = \$780 pp				\$2,340		\$2,340		\$2,340		\$2,340		\$2,340		\$11,700	\$0
(1.5 days, 2 ppl, \$40Dpp air, \$150pp hotel x 2 nights, per diem of \$40				\$1,560		\$1,560		\$1,560		\$1,560		\$1,560		\$7,800	\$0
														\$0	\$0
CONTRACTS														\$0	\$0
Leadership Development	10	10	0	\$50,000		\$100,000		\$80,000		\$50,000		\$25,000		\$30, 5 000	\$0
HRIS Systems Implementation				\$350,000		\$750,000		\$400,000		\$24,000		\$0		\$1,524,000	\$0
Consultant - M3/TAS	1			\$25,000		\$100,000		\$50,000		\$0		\$0		\$175,000	\$0
External Evaluator	1	1		\$40,000		\$100,000		\$100,000		\$100,000		\$80,000		\$510,000	\$0
Communications Strategy	1	1		\$30,000		\$30,000								\$60,000	\$0

				16 LEAs		17 LEAs		18 LEAs		19 LEAs		20 LEAs			
				26 schools in		28 schools		29 schools		30 schools		31 schools			
Funded Category				2017		2018		2019		2020		2021			
	Total# positions	Grant Funded	MCS Funded	Year1 Grant	Non Federal Year1	Total Grant Cost year 2	Non Federal Year2	Year3	Non Federal Year3	Year4	Non Federal Year4	Year 5	Non Federal Year 5	Five Year Grant Costs	Five Year Non Federal Costs
														\$0	\$0
														\$0	\$0
INDIRECT COSTS (8%)				\$158,691		\$373,412		\$333,151		\$225,382		\$136,738		\$1,227,373	\$0
														\$0	\$0
STIPENDS														\$0	\$0
Candidate Training and Retention Incentives (20 @ 1500 each)	20	20	D			\$40,000		\$40,000		\$40,000		\$20,000		\$140,000	\$0
TOTAL GRANT				\$2,142,327		\$5,081,059		\$4,537,534		\$3,082,655		\$1,865,957		\$16,709,532	
TOTAL NON FEDERAL					\$3,069,000		\$3,960,000		\$4,197,600		\$4,530,401		\$4,804,318		\$20,561,319
TOTAL PROJECT COST															\$37,270,851
?															
INDIRECT COSTS				\$1,983,636		\$4,667,647		\$4,164,384		\$2,817,273		\$1,709,220		\$15,342,159	

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TOT AL PROJECT COST 2017 2021:

	Grant Year 1	Year2	Year 3	Year 4	Year 5	TOTAL TIF PROJECT BUDGET
TOTAL GRAN T FUNDS	\$2,142,327	\$5,081,059	\$4,537,534	\$3,082,655	\$1,865,957	\$16,709,532
TOTAL NON- FEDERAL FUNDS	\$3,069,000	\$3,960,000	\$4,197,600	\$4,530,401	\$4,804,318	\$20,561,319
TOTAL PROJECT COSTS	\$5,211,327	\$9,041,059	\$8,735,134	\$7,613,056	\$6,670,275	\$37,270,851

U.S. DEPARTMENT OF EDUCATION
SUPPLEMENTAL INFORMATION
FOR THE SF-424

OMB Number: 1894-0007
Expiration Date: 08/31/2017

1. Project Director:

Prefix:	First Name:	Middle Name:	Last Name:	Suffix:
<input type="text"/>	Courtney	<input type="text"/>	Collins-Shapiro	<input type="text"/>

Address:

Street1:	5700 Wayne Ave.
Street2:	<input type="text"/>
City:	Philadelphia
County:	<input type="text"/>
State:	PA: Pennsylvania
Zip Code:	19144
Country:	USA: UNITED STATES

Phone Number (give area code)	Fax Number (give area code)
<input type="text"/>	<input type="text"/>

Email Address:

2. Novice Applicant:

Are you a novice applicant as defined in the regulations in 34 CFR 75.225 (and included in the definitions page in the attached instructions)?

Yes No Not applicable to this program

3. Human Subjects Research:

a. Are any research activities involving human subjects planned at any time during the proposed Project Period?

Yes No

b. Are ALL the research activities proposed designated to be exempt from the regulations?

Yes Provide Exemption(s) #: 1 2 3 4 5 6

No Provide Assurance #, if available:

c. If applicable, please attach your "Exempt Research" or "Nonexempt Research" narrative to this form as indicated in the definitions page in the attached instructions.

<input type="text"/>	Add Attachment	Delete Attachment	View Attachment
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**U.S. DEPARTMENT OF EDUCATION
BUDGET INFORMATION
NON-CONSTRUCTION PROGRAMS**

OMB Number: 1894-0008
Expiration Date: 06/30/2017

Name of Institution/Organization

Mastery Charter High School

Applicants requesting funding for only one year should complete the column under "Project Year 1." Applicants requesting funding for multi-year grants should complete all applicable columns. Please read all instructions before completing form.

**SECTION A - BUDGET SUMMARY
U.S. DEPARTMENT OF EDUCATION FUNDS**

Budget Categories	Project Year 1 (a)	Project Year 2 (b)	Project Year 3 (c)	Project Year 4 (d)	Project Year 5 (e)	Total (f)
1. Personnel	1,124,800.00	2,714,960.00	2,674,609.00	1,999,525.00	1,212,363.00	9,726,257.00
2. Fringe Benefits	359,936.00	868,787.00	855,875.00	639,848.00	387,956.00	3,112,402.00
3. Travel	3,900.00	3,900.00	3,900.00	3,900.00	3,900.00	19,500.00
4. Equipment	0.00	0.00	0.00	0.00	0.00	0.00
5. Supplies	0.00	0.00	0.00	0.00	0.00	0.00
6. Contractual	495,000.00	1,080,000.00	630,000.00	174,000.00	105,000.00	2,484,000.00
7. Construction	0.00	0.00	0.00	0.00	0.00	0.00
8. Other	0.00	0.00	0.00	0.00	0.00	0.00
9. Total Direct Costs (lines 1-8)	1,983,636.00	4,667,647.00	4,164,384.00	2,817,273.00	1,709,219.00	15,342,159.00
10. Indirect Costs*	158,691.00	373,412.00	333,151.00	225,382.00	136,738.00	1,227,374.00
11. Training Stipends	0.00	40,000.00	40,000.00	40,000.00	20,000.00	140,000.00
12. Total Costs (lines 9-11)	2,142,327.00	5,081,059.00	4,537,535.00	3,082,655.00	1,865,957.00	16,709,533.00

***Indirect Cost Information (To Be Completed by Your Business Office):**

If you are requesting reimbursement for indirect costs on line 10, please answer the following questions:

(1) Do you have an Indirect Cost Rate Agreement approved by the Federal government? Yes No

(2) If yes, please provide the following information:

Period Covered by the Indirect Cost Rate Agreement: From: To: (mm/dd/yyyy)

Approving Federal agency: ED Other (please specify):

The Indirect Cost Rate is %.

(3) If this is your first Federal grant, and you do not have an approved indirect cost rate agreement, are not a State, Local government or Indian Tribe, and are not funded under a training rate program or a restricted rate program, do you want to use the de minimis rate of 10% of MTDC? Yes No If yes, you must comply with the requirements of 2 CFR § 200.414(f).

(4) If you do not have an approved indirect cost rate agreement, do you want to use the temporary rate of 10% of budgeted salaries and wages?
 Yes No If yes, you must submit a proposed indirect cost rate agreement within 90 days after the date your grant is awarded, as required by 34 CFR § 75.560.

(5) For Restricted Rate Programs (check one) -- Are you using a restricted indirect cost rate that:

Is included in your approved Indirect Cost Rate Agreement? Or, Complies with 34 CFR 76.564(c)(2)? The Restricted Indirect Cost Rate is %.
PR/Award # U374A160071

Name of Institution/Organization	Applicants requesting funding for only one year should complete the column under "Project Year 1." Applicants requesting funding for multi-year grants should complete all applicable columns. Please read all instructions before completing form.
Mastery Charter High School	

**SECTION B - BUDGET SUMMARY
NON-FEDERAL FUNDS**

Budget Categories	Project Year 1 (a)	Project Year 2 (b)	Project Year 3 (c)	Project Year 4 (d)	Project Year 5 (e)	Total (f)
1. Personnel	2,325,000.00	3,000,000.00	3,180,000.00	3,432,122.00	3,639,635.00	15,576,757.00
2. Fringe Benefits	744,000.00	960,000.00	1,017,600.00	1,098,279.00	1,164,683.00	4,984,562.00
3. Travel						
4. Equipment						
5. Supplies						
6. Contractual						
7. Construction						
8. Other						
9. Total Direct Costs (lines 1-8)	3,069,000.00	3,960,000.00	4,197,600.00	4,530,401.00	4,804,318.00	20,561,319.00
10. Indirect Costs						
11. Training Stipends						
12. Total Costs (lines 9-11)	3,069,000.00	3,960,000.00	4,197,600.00	4,530,401.00	4,804,318.00	20,561,319.00

SECTION C - BUDGET NARRATIVE (see instructions)

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